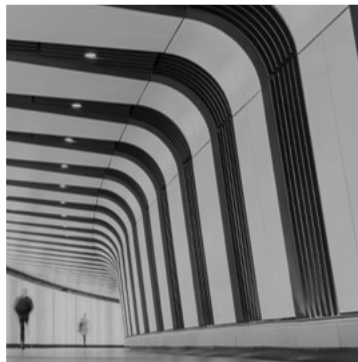# smps®

chapter
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manual

COMMUNICATIONS

2020–21

SMPS MISSION

To advocate for, educate, and connect leaders in the building industry.

SMPS VISION

Business Transformed through Marketing Leadership.

Our vision is for firms to execute marketing principles (research, strategy, branding, communications) to drive business decisions and pursue work that aligns with their brand, which will result in profitable operations and a respected market position.

What does "business transformed" mean?

- Being able to clearly define and communicate what sets your firm apart
- Understanding the important balance between marketing and business development
- Helping our members anticipate and navigate the trends and challenges on the horizon
- Operating your business like it's not business as usual

SMPS DEI PHILOSOPHY & POLICY

SMPS recognizes, respects, and values the dignity of all people. We are united in our stance against all forms of injustice and inequity. SMPS commits to actively champion diversity, equity, and inclusion (DEI) within our organization, the firms we represent, the communities we serve, and the architecture/engineering/construction (A/E/C) industries. We are intentionally working to increase participation in our organization and the A/E/C industries by underrepresented groups; advocate for recruitment and retention of professionals of all backgrounds by creating inclusive and welcoming environments; and promote equality and opportunities for advancement in the Society and industry overall. Together, we can transform our businesses, enhance membership experiences, and influence change in our communities.

We recognize that our diversity is reflected by our different people and firms. We believe our varying ethnicities, cultures, religious beliefs, genders, sexual orientations, ages, levels of experiences, physical abilities, and other differences benefit us as individuals and as an organization. In SMPS, we will organize and promote programs and activities that espouse our beliefs and increase awareness, understanding, recruitment, and participation of diverse persons and firms.

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TABLE OF CONTENTS

SAMPLES, RESOURCES, AND FORMS

All sample documents, resources, and forms referenced in this manual may be found in the library of the MySMPS All Chapter Leaders Community, in the Chapter Management Manual Folder/ Communications Docs.

Samples and forms:

- ☑ Membership Collateral
- ☑ Chapter Identity Guidelines
- ☑ Editorial Guidelines
- ☑ A Chapter's Guide to Using the SMPS Personas
- ☑ Chapter Websites
- ☑ Contribute to SMPS Marketer QuickLook
- ☑ Chapter Logos
- ☑ Photo/Video Release

INTRODUCTION

This information is intended to assist the chapter with a program of communications and public relations (PR). In its most basic form, communication brings your organization's message to the attention of an audience. A solid communications program builds a more effective organization. By raising the visibility of your chapter, you can gain credibility, generate interest in programs, and increase membership.

PROGRAM STRUCTURE

- Designate a spokesperson. Establish a policy stating who may speak on behalf of the chapter. The spokesperson should be well-briefed on the chapter's mission, issues, and activities. Typically, this would be the president or president-elect.

- Establish a PR committee. Designate a chairperson in accordance with your chapter bylaws. Screen candidates carefully; look for someone who:
  - ☑ demonstrates skill, experience, and a successful track record in this area
  - ☑ is familiar with chapter policy, mission, and goals
  - ☑ has knowledge of SMPS as a professional organization

- Develop a PR plan. Include mission statement, specific goals, tasks, timeline for completion of tasks, persons responsible, and funds needed.

Communication begins at home. Since every member in some way represents your chapter to an outside audience, you must keep them informed about chapter policy, programs, and activities. Several effective methods for keeping members in the loop are a website, newsletter, email, phone calls, letters, and announcements during chapter meetings/events about member benefits and services (local and Society benefits).

INTERNAL COMMUNICATIONS

Identity Guidelines

The SMPS identity guidelines are a vital part of our communications efforts because they document our accepted standards for current and future applications by SMPS.

The guidelines are for your use in helping us keep these standards in place. Please follow these guidelines as you develop your chapter's promotional materials. Guidelines can be found in the All Chapter Leaders Community library in MySMPS.

Editorial Guidelines

SMPS HQ follows the AP stylebook (for editorial style). A quick reference guide is provided in the All Chapter Leaders Community library in MySMPS to assist chapters.

Website

There's no better or more economical way to make information available to members and nonmembers alike than a chapter website.

Basic content usually consists of the following:

- **Home Page**. Introduction and information about SMPS (chapter and national) in addition to navigation bars and buttons, social media links, and contact information.

- **Contacts**. List of officers and committee chairs along with their contact information.

- **Programs**. Annual calendar of chapter events, detailed information per program, downloadable program registration forms, or a link to online registration.

- **Member Directory**. Link to the Member Directory on MySMPS.org—find members via a basic or advanced search. Member profile includes contact information, company demographic information, photo, bio, social media links, education, and more.

- **Newsletter**. Post PDF files for downloading.

- **Public Relations**. Post press releases and articles.

- **Resources**. Add links to the following pages from the SMPS website to assist members in locating valuable resources:

  - ☑ Annual Awards Programs: smps.org/awards
  - ☑ Annual Conference: buildbusiness.org
  - ☑ Bookstore: smps.org/smpsstore
  - ☑ Career Center: smps.org/career
  - ☑ Certification (CPSM): smps.org/certification
  - ☑ Foundation research: smps.org/foundation
  - ☑ Learning: smps.org/learning
  - ☑ Marketing Resource Center: my.smps.org/mrc
  - ☑ Salary Survey: smps.org/salary-survey

- **Members Only.** Optional, depending on what your chapter offers as member benefits. Password protected.

- **Blog**. A great online resource to write and post articles about the A/E/C industries and news related to the profession.

SMPS Online Community

MySMPS.org is the Society's award-winning online community. This community can enhance chapter communication and interaction with and among members, while saving the chapter money and time.

So, how can a chapter tap into MySMPS to better serve its members?

- Create a chapter directory of your members, linked to their personal profiles.

- Encourage social networking among members of your chapter—each SMPS member is invited to share information via their personal profile, creating opportunities to identify and connect with other professionals with common interests.

- Communicate easily and efficiently with your members via email—and generate an archive of chapter communications.

- Facilitate committee collaboration via work groups and wikis.

- Organize, share, and archive chapter documents in one place using the library feature.

- Host message boards to continue the dialogue on hot topics that emerge out of your educational programs.

- Promote upcoming chapter events and meetings on your chapter's community calendar—and with one step, add those events to the Society calendar.

- Connect your members to the Society's resources like the Marketing Resource Center and its valuable marketing and business development samples and models.

A Chapter's Guide to Using the SMPS Personas

SMPS created personas during our rebranding efforts to help us relate to and provide mental pictures of our members. We combined SMPS demographic data with available psychographic/buyer behaviors to create the personas. There are six different personas representing the most common demographics and segments of our membership including firm leader, vice president of marketing, director of marketing, business development manager, marketing manager, and marketing coordinator.

Chapters (along with SMPS HQ) can use the SMPS personas to help us better personalize our marketing, create targeted messages/programs that resonate with the different segments of the membership, and customize the SMPS experience. Below are some tips to help chapters utilize the SMPS personas. Please refer to A Chapter's Guide to Using the SMPS Personas that has been downloaded into MySMPS for a full overview of the personas.

Getting Started:

- Review the SMPS personas and become familiar with them.

- Check your chapter demographics to see if all of the personas are currently represented in your chapter.

- Discuss/brainstorm ways to use the personas to improve the SMPS experience.

- Think about different ways to segment the membership by each persona to provide more personalized benefits, offerings, topical information.

- Does your programming offer something for each persona? If not, what can you do to change that or enhance your offerings? Based on your chapter make up, does this make sense?

- Keep the personas in mind as you plan for the current and coming years.

E-newsletter

It's a chapter's duty to inform members about SMPS-sponsored activities and to report on other news of general interest. Your newsletter projects an image. If it appears professional in design and content, your chapter will come across as professional and organized as well.

Determine newsletter content by the purpose it's designed to serve. You probably have a general idea about what the purpose of your newsletter is; put it in writing. When drafting a statement of purpose, think about the goals and needs of your chapter and how its newsletter can support them. Pitch the statement of purpose to your board of directors and get buy-in.

Various components can be incorporated into a newsletter. The table below outlines those items that are considered must-haves and those that are optional.

Considered "Must-Haves"	Optional
- Masthead - List of officers and staff - Chapter address, phone number, email, website - Chapter program coverage - Upcoming programs - New members - Photos - Report on chapter activities other than monthly program	- Major news/information story - Expert column - Editorial - Advertising - Member spotlights

Where do I find content for my chapter newsletter? SMPS HQ invites you to share information from our weekly e-newsletter, *SMPS Marketer QuickLook*. Arriving in mailboxes each Tuesday, *Marketer QuickLook* includes SMPS announcements, updates, and events.

What can my chapter contribute to *Marketer QuickLook*? Information on full-day conferences along with chapter and member spotlights (volunteer efforts, #SMPSGivesBack, members on the move/new job announcements, award recipients). In addition, contributions may include articles related to the profession or industries. These articles must reside on a website or blog so that we can link to the full story. Visit the *Marketer QuickLook* page on the SMPS website (under the "Resources" tab) for details on how to submit your contributions.

Periodic Communications

Following is a sampling of communication tools many chapters are using:

- A monthly email. Content is directed toward chapter business (e.g., program dates, due dates, calls for volunteers, venue changes, opinion polls)

- A phone call from a chapter leader. A reach-out-and-touch program is a way to talk to individual members and encourage two-way communication that can inform chapter decisions.

- A letter from the chapter president can be used to educate members about a specific issue that is too lengthy or complicated to be handled in newsletter format.

- Membership surveys. The most direct way to find out what members think is to ask them. Surveys can be conducted using any or all of the above media. SMPS often conducts surveys using Survey Monkey, an easy-to-use, web-based utility. Contact SMPS HQ for username and password to the SMPS Survey Monkey account. Don't recreate the wheel; there are hundreds of surveys created by chapters and HQ you can simply copy.

- Social media posts on membership, benefits, meetings, events, and more. Follow SMPS HQ on <u>Facebook,</u> <u>Twitter,</u> <u>Instragram,</u> and <u>LinkedIn</u> to share and retweet posts.

Mailing lists.

Most chapters maintain a mailing list composed of: (please remember to share your nonmember and prospects lists with SMPS HQ regularly)

- their local members

- nonmembers who have attended chapter programs

- prospective members in their area

EXTERNAL COMMUNICATIONS

Membership Collateral/Brochures

SMPS has developed membership collateral materials to assist with recruitment and retention. If your chapter has a need for additional materials for a targeted chapter outreach effort, please visit <u>MySMPS All Chapter Leaders Community Library</u> or contact the membership team at <u>membership@smps.org</u> to discuss quantities, any associated fees, and your plans. Additional <u>one-page flyers</u> on reasons to join, MySMPS, and the referral campaign are available there as well.

Member Social Media Policy

SMPS believes in fostering a thriving online community and supports social media as a valuable asset for membership development and communications. The following policy outlines the legal and membership maintenance implications of social media use in regard to the organization.

Rules of Engagement

All members of SMPS are personally responsible for the content they publish on blogs, social sites, wikis, or any other form of user-generated media. Be mindful that what you publish will be public for a long time—protect your own privacy and that of SMPS.

- Members and moderators must make it clear that they are speaking for themselves and not on behalf of SMPS in their online publishing. Except in rare cases, members should not have a need to be discussing SMPS business matters in their personal online publishing.

- Members publishing content to any website outside of the SMPS site, and it having relevance to work or subjects associated with SMPS, must use the following disclaimer: "The postings on this site or forum are my own and don't necessarily represent the positions, strategies, or opinions of SMPS."

- All members must abide and respect copyright, fair use, and financial disclosure laws.

- No member may provide SMPS or another member's confidential or other proprietary information without SMPS HQ approval. Members and moderator musk seek HQ approval to publish or report on conversations that are meant to be private or internal to SMPS.

- Members and moderators will not cite or reference other members, SMPS partners, or suppliers without their approval.

- Members and moderators will not use ethnic or gender slurs, personal insults, obscenities, or engage in any conduct that would not be acceptable to the SMPS membership code of conduct.

- Members will show proper consideration for others' privacy and for topics that may be considered objectionable or inflammatory—such as politics, religion, race, or gender preference.

- Members identifying themselves as representatives of SMPS must ensure that their profile and related content is consistent with how the overall organization wishes to present itself to the general public.

- Members will not post SMPS-related content that is provocative, such as inappropriate photographs or information.

- Members will not post SMPS-related content in reference to drinking alcohol or illegal drug use.

- Members will not bad-mouth other members in social media and other open public forums.

- Members will not make discriminatory comments.

- Members will not share confidential information related to the organization.

- Members must be aware that violations of the Member Social Media Policy may result in membership termination.

- Members can post honest, informative and respectful comments—no spam and no off-topic or offensive remarks.

- Members and moderators must not allow or post graphic, obscene, explicit, or racial comments or submissions that are abusive, hateful, or intended to defame anyone or any organization.

- Members and moderators must not allow or post solicitations or advertisements in SMPS related social media outlets. This includes promotion or endorsement of any financial, commercial, or non-governmental agency. Similarly, do not allow attempts to defame or defraud any financial, commercial, nonprofit, or non-governmental entity.

- Members and moderators must not allow or post comments that suggest or encourage illegal activity.

Legal Parameters

The following covers your legal responsibilities and nondisclosure obligations as a member of SMPS. Failure to abide by these two guidelines can result in legal liability and removal of membership status for individual members and/or moderators who allow individuals to post on SMPS-related online and social media platforms.

Legal Liability

When members choose to go public with their opinions via a social media outlet, they are legally responsible for their commentary. Individual members and moderators can be held personally liable for any commentary deemed to be defamatory, obscene (not swear words, but rather the legal definition of "obscene"), proprietary, or libelous (whether pertaining to SMPS, individuals, or any other SMPS entity for that matter). For these reasons, members and moderators should exercise caution with regards to exaggeration, colorful language, guesswork, obscenity, copyrighted materials, legal conclusions, and derogatory remarks or characterizations. In essence, your social media use is at your own risk. Outside parties actually can pursue legal action against you (including SMPS) for postings that violate the SMPS Member Social Media Policy.

Organization Privileged Information

Any confidential, proprietary, or association/trade secret information is obviously off-limits for social media distribution per the copyrighted laws pertaining to SMPS and its intellectual property (Examples: webinars, logos, Body of Knowledge, Domains of Practice) unless specified different by HQ. SMPS branded materials and their trademarks are also off-limits without proper authorization per the Society's brand guidelines. Anything related to SMPS policy, inventions, strategy, financials, products, etc. that has not been made public cannot appear in your social media platform under any circumstances. Disclosing confidential or proprietary information can negatively impact our organization and may result in legal violations for the organization. When applicable, please include attribution.

Social Media Guidelines

Social media can be an exciting and powerful way for chapters to connect with existing and potential members. SMPS encourages chapters to follow SMPS via our social media channels and borrow relevant content that is of interest to your members.

- **Twitter**: @smpshq (www.twitter.com/smpshq)

- **Facebook**: Society for Marketing Professional Services (https://www.facebook.com/SMPSHQ)

- **LinkedIn**: Society for Marketing Professional Services (https://www.linkedin.com/society-for-marketing-professional-services/)

- **YouTube**: Society for Marketing Professional Services (https://www.youtube.com/user/SMPSNational)

- **Instagram**: SMPS HQ (https://www.instagram.com/smpshq/)

Recommendations

These four recommendations provide a roadmap for constructive, respectful, and productive dialogue between members, moderators, and their use of social media as representatives of SMPS. These are not rules and thus they can't be broken. There is no hidden meaning or agenda. We consider these to be best practices guidelines that are in the spirit of SMPS culture and the best interest of all members. We encourage all SMPS members to follow these guidelines, but it is not mandatory to do so.

1. Be Respectful to Other Members and Affiliates

Be thoughtful and accurate in your posts, and be respectful of how other members may be affected. All members can be viewed (correctly or incorrectly) as representatives of the organization, which can add significance to public reflections on the organization. Members, who identify themselves as members of the organization in their social media outlets and comment on the company at any time, should notify their chapter leadership of the existence of their social media outlet. You are not being asked to alert your chapter about all your posts, but consider letting them know you have a social media outlet where you or others may write about SMPS. Whether you're local or HQ leadership chooses to occasionally read your posts or not, the courtesy heads-up is always appreciated.

2. Get Your Facts Straight

As a member of SMPS, you have the opportunity to contact other members and affiliates who are responsible for products, services, or other SMPS initiatives that you may want to write about. To ensure you are not misrepresenting your fellow SMPS members or their work, consider reaching out to the member before posting. This courtesy will help you provide your readers with accurate insights, especially when you are writing or allowing others to write outside of your area of expertise. If there is someone in SMPS who knows more about the topic, check with them or SMPS HQ to make sure you have your facts straight before posting or moderating.

3. Provide Context to Your Argument

Please be sure to provide enough support in your posting to help members understand your reasoning, be it positive or negative. We appreciate the value of multiple perspectives, so help us to understand yours by providing context to your opinion. Whether you are posting in praise or criticism of the A/E/C community, you and other contributors are encouraged to develop a thoughtful argument.

4. Engage in Private Feedback

Not everyone who is reading your social media content will feel comfortable approaching you if they are concerned their feedback will become public. In order to maintain an open dialogue that everyone can comfortably engage in, SMPS members and moderators are asked to welcome "off-network" feedback from their colleagues who would like to privately respond, make suggestions, or report errors without having their comments appear in your social media outlet. Members may want to know what you think. If you have an opinion, correction, or criticism regarding a posting, reach out to the member directly. Whether privately or on their social media wall, let the member know your thoughts.

Even though it is a personal decision to engage in social networking, it can have consequences to the membership of SMPS. Therefore, you will be held responsible for the content you post.

Chapter Checklist

- Develop a social media committee that serves at the direction of the chapter communications chair/committee.

- Name multiple administrators to each social media account. If only one administrator can be assigned to an account, make sure more than one person holds the username and password.

- Utilize a tool like Hootsuite that will allow you to schedule posts for times when you are unable to post live.

- Keep a social media calendar in your board group in MySMPS or using another calendar tool so the communications committee and chapter board know when posts are going out.

- Divide up posts by type of event, member recruitment, general messages, etc. in order to share the workload and engage more volunteers.

- Provides links from your chapter website to your social media spaces and from your social media back to the chapter website.

Follow SMPS brand standards and utilize chapter logos provided in the Chapter Board and All Chapter Leaders libraries of MySMPS.

Social Media Tools

Here are some tools that we use and recommend to assist SMPS chapters with images and social media.

Canva is a free online resource that gives users the ability to create beautiful layouts through a simple drag and drop tool. Through Canva's search function, you can choose from more than one million layouts, stock photographs, and illustrations for your designs. The paid version of Canva (Canva for Work) gives the user the ability to upload their own images and to collaborate with teams.

Hootsuite allows users to manage multiple networks, save time posting content to your networks, schedule posts, and engage your audience, all in one place. Get started free or upgrade to pro or business level.

Public Relations

This is a step-by-step process, that aims to increase external exposure for the chapter. Develop a media list, gather event information, write and distribute press releases to the appropriate audience, and assemble a media kit.

- **Media List Development**. Target the news media you need: daily or weekly newspapers, local magazines, television, and radio stations. Keep in mind that chapter news is generally of local interest.

  Invest the time to educate a few reporters and keep them informed about news of interest in your chapter. Your goal is to become a valued news source for the reporters who cover your industry. If your chapter has an awards program, consider inviting local reporters or editors to participate as jurors. This creates an opportunity to build media relationships in person while exposing the media to the news and activities in your chapter and to the value of marketing in the A/E/C industries.

- **Press Releases.** Press releases convey basic information: the who, what, where, and when of chapter news. When preparing a chapter press release, keep the following in mind:

  - ☑ Use chapter letterhead
  - ☑ Do not exceed two pages (double or 1.5 spacing, 11–12 pt. type)
  - ☑ Date the release
  - ☑ Include the name, phone number, and e-mail address of a chapter contact
  - ☑ Stick to the facts; keep the writing clear and concise

- **Fact Sheet.** A fact sheet is a quick reference about SMPS in general and your chapter specifically that can be of great help to the media or organizations you are partnered with for a program or event. It answers questions such as:

  - ☑ How many members do you have?
  - ☑ Who are your members?
  - ☑ What trades do your members represent?
  - ☑ What is your organization's purpose?
  - ☑ What services do you provide for your members?
  - ☑ What issues are of concern to your members?

- **Q&A Backgrounder.** A Q&A backgrounder is helpful in answering commonly asked questions about your chapter. It can serve as a reference to member prospects, the media, and outside organizations and can also be used to supplement a fact sheet.

- **Community Outreach.** Analyze your chapter's public relations goals. How do you want the public to perceive you? Is there a public service project that will help you achieve your goals? Many SMPS chapters have found that public service projects increase their community visibility, promote the professionalism and civic responsibility of their members, and build an esprit de corps within the chapter. The following factors can contribute to the success of community outreach projects:

  - ☑ A project that inspires a majority of members and taps into their special strengths
  - ☑ A volunteer willing to spearhead the effort and a dedicated committee
  - ☑ A full appreciation of the time involved and a serious commitment by the chapter as a whole
  - ☑ Cash and in-kind contributions, since almost all public service projects require a financial investment

- **Potential beneficiaries include**:
    - ☑ Canstruction. A unique design/build competition that fights hunger in local communities. For more information, visit www.canstruction.org.
    - ☑ Christmas in April USA. Home improvements for the needy. For more information, visit www.rebuildingtogether.org.
    - ☑ Habitat for Humanity. Building homes for the needy. For more information, visit www.habitat.org.

- **Industry Liaisons.** Maintain ongoing communication with affiliated industry and business organizations.
    - ☑ Exchange monthly newsletters
    - ☑ Volunteer to write guest articles for their newsletter
    - ☑ Put volunteer leaders or staff on your chapter's mailing list
    - ☑ Offer to provide speakers on topics of common interest
    - ☑ Plan joint programs

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