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Dear **[Insert Company Name Here]** Ethics Discussion Leader,

ETHICS AS CULTURE  
*Discussion Leader Workbook*

2016

Thank you for your role in helping promote an ethical culture at **[Insert Company Name Here]**. Research tells us that employees are more likely to conduct themselves with integrity and report misconduct when they believe senior management has a genuine and long-term commitment to ethical behavior. And we are happier and more productive when we take pride in who we are and what we represent and are not distracted or made anxious by co-workers who break rules or violate the law.

We have a strong and long-standing ethical reputation. We also understand that it is fragile and can topple suddenly. Our clients, other stakeholders and the public, demand that we will behave ethically in all that we do. Building a strong foundation on which to makes ethical decisions and behave every day in a truly transparent manner with customers, partners, suppliers and each other, is critical to our credibility, trust and long-term success.

We have energized our ethics program this year with the help of a broad-based panel of leaders representing every region of our agency. The goal: strengthen our commitment to being the best in the industry through an ethical work environment and client service, based on the highest ethical standards and practices.

Following is more information to help you deliver the training.

Thank you for agreeing to lead this very important session. Please contact your Human Resources department if you have any questions.

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# Materials for Effectively Conducting **[Insert Company Name Here]**’s Ethics Training

**[Insert Training Name Here]** consists of a PowerPoint presentation, video from **[Insert CEO Name Here]**, Discussion Leader Workbook, and Participant Workbook. All of these documents can be found on **[Insert Location Here]**:

* The ethics PowerPoint presentation has been updated to have a broader reach which includes a global perspective and relevant issues such as social media. It also contains an ethical framework to aid managers and employees in making ethical decisions. Discussion leader notes are provided on each slide.
* The video contains a message from **[Insert CEO Name Here]**,expressing the importance of this program and **[Insert Company Name Here]**’s ethical culture. The video is a separate file but is also incorporated into the ethics presentation. It is important to remember to save the video file in the same folder as the presentation for the PPT to read the video link.
* The Discussion Leader workbook provides notes regarding the appropriate solution to each scenario. If an ethical dilemma applies directly to a(n) **[Insert Company Name Here]** policy, that specific policy is cited. Please print the workbook locally for your use.
* The Participant workbook gives employees an opportunity to immerse themselves into ethical dilemmas and then contemplate the appropriate response. For each scenario, there is a notes section. Please print the workbooks locally.

**What’s in the Discussion Leader workbook?**

* This book contains both the ethics presentation and the ethical scenarios. Both are accompanied by discussion leader notes.
* You will not have enough time to cover every scenario. The highlighted scenarios are suggested “priority.” Please use your discretion when determining the scenarios that you will cover during the session. Take time to examine and select priorities in advance of your meeting. If you are uncertain, touch base with your manager. There may be specific issues that are more relevant and meaningful at this time based on your location, participants or other factors.

Getting Started

* Ethics training should be delivered as a “live” group presentation to promote discussion.
* Each employee should receive a hard copy of the Participant Workbook.
* Discussion leaders may also want to print “handouts” of the presentation to provide the employees with the slides for note taking.
* Discussion leaders should begin by presenting **[Insert Company Name Here]**’s new ethics PowerPoint, **[Insert Training Name Here]**. The PowerPoint presentation should take about 15-20 minutes to cover.
* The PowerPoint presentation should be followed by an interactive discussion of the scenarios you select. Each scenario takes 4-5 minutes, but this can vary based on discussion. Plan to spend at least 45 minutes discussing the scenarios. Promote discussion and examples from others.
* Discussion leaders may want to schedule more than 60 minutes for this training session.
* Since this is a mandatory training session for new employees, please record and report attendance to your office manager/Human Resources department.
* Please contact Human Resources if you have any questions.

**Ethics Scenarios**

**Policy Case Scenarios:**

1. An Invitation
2. Kevin’s Dilemma
3. Sally’s Billable Hours
4. Providing Referrals
5. Follow Recruitment Policies
6. Credit Where Credit is Due

The Policy Case Scenarios above can be part of pre-reading; not necessary for in-person training.

1. Managing Client Relationships
2. Separating Personal and Client Relationships
3. Targeted Marketing
4. Maintaining Trust
5. Voting Rally

**Ethical Dilemma Scenarios:**

1. Sam’s Assignment
2. Product Safety
3. Sandy & Jim
4. Relevance of the Past
5. How Much to Report
6. What Kind of Press Release?
7. Taking an Assignment
   1. There are two scenario options*.*
8. Employee Layoffs
9. Award Nomination
10. Maintain Client Confidentiality
11. Twice the Work, Half the Effort
12. Promoting the Truth
13. Client Relations
14. Security Breach
15. Media Coverage
    1. There are two scenario options*.*
16. Opinions About Competition
17. Dealing with Client Conflict
    1. There are two scenario options.
18. Transparency Is Not Just a Social Media Issue
19. New Business vs. Existing Clients
20. Intellectual Property Precautions

**Social Media Scenarios:**

1. Sharing a Compliment
2. Tweeting for Others
3. Personal Endorsement
4. Social Media Support
5. Blogging Incentive
6. Damage Control
7. Disclose or Not to Disclose?

**Policy Case Scenarios**

1. An Invitation

**Option A:** You have been invited to attend the opening night performance of a highly acclaimed play. The invitation comes from a senior member of a firm hoping to do business with **[Insert Company Name Here].** This person has also invited you to join the party for a dinner at a new fancy restaurant before the performance. What should you do?

\_\_\_\_\_ Accept tickets and dinner

\_\_\_\_\_ Do not accept tickets and dinner

\_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Discussion leader notes:**

* The proper response to this case is “Do not accept the tickets and dinner.”
* Guidance is provided in the “Gifts” section of operating policies (see link below) indicating that gifts valued at $100 or more cannot be accepted and must be returned.
* In this case, the entertainment would clearly add up to more than $100.

**Policy Reference:**  [insert policy information here]

**Option B:** A client asks you to make a contribution to a cause for which they’re soliciting, suggesting that you add a few hours to your next bill. What should you do?

\_\_\_\_\_Add hours to bill

\_\_\_\_\_ Say no

\_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Discussion leader notes:**

* The proper response to this case is "Say no.”
* However, this does not fully resolve the dilemma, and some people may write in other answers.
* Generate more discussion about how you could help the client by coming up with a creative solution that doesn't require an ethical compromise.

**Policy Reference:**  [insert policy information here]

2.Kevin’s Dilemma

Kevin is new to agency life. He used to work in the corporate world. He often struggles with tracking his time and questions what is “fair” to the client. He is not sure what to do when he spends more time than he should on a piece of work or has to re-work something that is due to his own inexperience. How would you advise Kevin?

\_\_\_\_\_ Record actual hours worked for each client

\_\_\_\_\_ Put in the time needed but not charge client for the re-work

\_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Discussion leader notes:**

* The correct answer is “Record actual hours worked for each client.” (See policy link for Time Entry and Billing)
* However, that is not sufficient for solving this dilemma (some may write in other answers).
* Generate more discussion by asking if managers have encountered this situation and how they have handled it. It is important that employees know they can and should be encouraged to raise these questions with the account lead/CRM and/or their immediate supervisor or group leader.

**Policy Reference:** [insert policy information here]

3. Sally’s Billable Hours

Sally is a recent university graduate and has taken her first job at **[Insert Company Name Here]**. She has been assigned to two accounts⎯one modest and one large account. Sally has been told by her supervisor to spend her time and effort commensurate with the size of each account. Sally developed a good working relationship with one of the executives at the smaller account and really believes in the product. Thus, she is finding herself spending more than the allocated time on this account. She turned in her time sheet to her supervisor with the same number of hours for each client. The supervisor called Sally into his office and said that she should not be working so many hours on the smaller client. He let her know that this time allocation is not acceptable. What should Sally do?

\_\_\_\_\_ Change the hours billed to reflect size of the account

\_\_\_\_\_ Continue to do what she thinks is right

\_\_\_\_\_ Discuss the situation with the partner-level in charge of the team

\_\_\_\_\_Change her practice going forward to allocate her time properly

\_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Discussion leader notes:**

* The first unacceptable answer is to change the billable hours. Falsification of time records is not only a violation of trust but can be a violation of the law (see policy link below).
* The second answer may sound OK, but on its face is wrong and requires more discussion. Sally is new and may not understand all the variables to know “what is right.” She can’t just defy her supervisor and not expect problems. She should discuss this with her supervisor for deeper understanding, as clarity by the supervisor for what is “commensurate with the size” may be needed here.
* Some participants may say that Sally should go over her supervisor on this issue. By the same token, she cannot ignore the size of the accounts and their importance to the firm.
* Generate a discussion on over service; although over service is not an ethical issue, it is a good discussion to have.

**Policy Reference:** [insert policy information here]

4. Providing Referrals

**Option A:** At a number of fundraising and social events, you’ve become acquainted with the brother of one of your chief client contacts. Nice guy, smart guy. He’s looking for a job shift and aims to work for a PR agency or in a corporate communications setting. Your client asks if you can provide a reference on his brother’s LinkedIn page. Do you?

\_\_\_\_\_ Provide the reference

\_\_\_\_\_ Deny the client’s request

\_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Discussion leader notes:**

* Sounds friendly and harmless but the correct answer is to deny the client’s request. It is not personal, it is policy (see link on reference checks and employment verification) that in your role as employee, you are prohibited from providing references of any kind (personal, professional, or otherwise) no matter how the request is received, and it also prohibits voluntary references of any kind. This includes a prohibition on employees providing references on social networking sites (e.g., LinkedIn, Spoke, etc.) that allow recommendations or referrals for individuals.
* It is wise to let your supervisor know of the conversation, so you are supported should the client press the issue

**Policy Reference:** [insert policy information here]

**Option B:** You have been asked by the client to hire a person they know personally for an upcoming on-site project. Then, the team was asked to “find a place for him” as part of our on-site team. How do you handle this situation?

\_\_\_\_\_ Provide the position

\_\_\_\_\_ Deny the client’s request

\_\_\_\_\_ Say you will ask your office leadership what the company policy is and get back to them

**Discussion leader notes:**

* We hire qualified individuals and would not employ someone unqualified to satisfy a client. This situation may involve a variety of strategic and professional issues, depending on the nature of the client relationship and history. The third answer is most appropriate.

**Option C:** Your client is the CEO of company X. You were hired to provide strategic counsel to him and work with his PR team on internal and external communications relating to a significant upcoming announcement. During the course of your work, the PR lead sent you an email (from her company account to your company account) asking about employment opportunities at FH. What do you do?

\_\_\_\_\_ Reply to the PR lead that you will forward this information to your Human Resource Department for processing.

\_\_\_\_\_ Say that we are discouraged from having recruitment conversations off the record while we’re working on an engagement. When the project is done, I can connect you to the right people.

\_\_\_\_\_ Ignore the email and if it come up again, tell the PR lead to contact your Human Resource Department.

\_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Discussion leader notes:**

* As in Option B, no specific policy dictates action here, although there are times the relationships between the firm and the client staffs are addressed contractually. The appropriate answer is the second one. Also, neither of you should be looking for work on company time or using company resources.

5. Follow Recruitment Policies

A reporter, Jenna, who is covering a number of your clients, expresses an interest in coming to work for your firm and asks for your help. Or a client, Sally, expresses such an interest. How would you advise Jenna and Sally?

\_\_\_\_\_Advise with information about the appropriate application process

\_\_\_\_\_Suggest you will put in a good word

\_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Discussion leader notes:**

* The proper response to this case is “Advise with information about the appropriate application process.”
* All clients need to be confident that all hires are based on skill and talent.
* Additional discussion could include potential repercussions from the media outlet or client if such a hire is made.

**Policy Reference:** [insert policy information here]

6. Credit Where Credit is Due

**[Insert Company Name Here]** and a competitor agency share the same client and are both working on the same project. While both agencies are involved, the client and competitor agency receive extensive praise in a major industry publication even though **[Insert Company Name Here]** did most of the heavy-lifting on the project. You have a personal, anonymous email account and want to leave a comment on the industry publication’s website that “sets the record straight.” Is this okay?

\_\_\_\_\_ Yes

\_\_\_\_\_ No

\_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Discussion leader notes:**

* The correct answer is “No” this is not okay. Why?
* You should realize that anything you post online, even if it is anonymous, may be captured and traced back to you.
* At the end of the day, NOTHING is anonymous online.
* When posting online, only post thoughts and information that you are willing to attach to your personal identity.
* The discussion leader can ask the question to the group, “Is there any value to setting the record straight?”

7. Managing Client Relationships

**Option A:** You are the CRM for one of the firm’s largest and longest-standing accounts. A junior member of your team tells you, in confidence, that the primary client contact has made some suggestive (offensive/inappropriate) remarks toward another member of your account team. What course of action do you take?

\_\_\_\_\_ Ignore the junior member’s comments

\_\_\_\_\_ Address the client contact regarding the suggestive remarks

\_\_\_\_\_ Immediately discuss the issue with your manager or HR representative

\_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Discussion leader notes:**

* The correct answer is “Immediately discuss the issue with your manager or HR representative.”
* **[Insert Company Name Here]** strongly disapproves of any form of employee harassment.
* Do not take harassment or inappropriate behavior situations into your own hands because there could be legal implications. DO ACT IMMEDIATELY if you are aware of a harassment situation or if a teammate claims harassment. HR should be notified immediately if there are any claims of harassment or discrimination.

**Policy Reference:** [insert policy information here]

**Option B:** You are the CRM for a client that wants to send a videographer out to shoot some footage of an event in which the client is participating. The client wants someone from the account team to accompany the videographer and during a meeting the client loudly and emphatically decides it should be a particular team member because, “she’s young and pretty and will get people to respond to her.” This was said in a room full of other staff members, men and women, young and middle-aged. What course of action do you take?

\_\_\_\_\_ Ignore the comment and assign her to the shoot

\_\_\_\_\_ Address the client contact about the suggestive remarks by saying we will look at what’s needed for that shoot and assign the best person for the assignment. You can then go back and address this with the client privately after the meeting and discuss with your supervisor and/or office manager.

\_\_\_\_\_ Address the client contact about the suggestive remarks by asking that person to meet you privately after the meeting and then discuss with your supervisor and/or office manager.

\_\_\_\_\_ Immediately step in during the meeting, denounce the suggestion as inappropriate, make clear your firm does not view that as acceptable behavior, ask for an apology for your colleague and then discuss afterward with your supervisor and/or office manager.

\_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Discussion leader notes:**

* The correct answer may seem situational and something to laugh off and ignore to avoid an uncomfortable scene but is reasonably the second but could be the third depending on circumstances. Why? Either way, innuendo and perceived harassment are issues that need to be addressed and resolved directly.
* **[Insert Company Name Here]** strongly disapproves of any form of employee harassment. Harassment is conduct that has the purpose or effect of creating an intimidating, hostile, or *offensive* work environment.
* Because you are there and a witness, you should ACT IMMEDIATELY and either way, immediately discuss the issue with your HR manager or supervisor afterward.

**Policy Reference:** [insert policy information here]

**Option C:** You are the manager of a female Asian-American. Someone from your team asks that employee to join him on a call with the assumption that she speaks Mandarin (she does not). When informed by said employee, the team member laughs it off and makes an off-color remark about it. The employee runs into your office in tears. What course of action do you take?

\_\_\_\_\_ Laugh it off, too, and tell her to lighten up, it is nothing personal

\_\_\_\_\_ Address the team member regarding the inappropriate and hurtful remarks

\_\_\_\_\_ Immediately discuss the issue with your manager or HR representative.

\_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Discussion leader notes:**

* The correct answer is “Immediately discuss the issue with your manager or HR representative.”
* **[Insert Company Name Here]** strongly disproves of any form of employee harassment.
* Do not take harassment or inappropriate behavior situations into your own hands because there could be legal implications. DO ACT IMMEDIATELY if you are aware of a harassment situation or if a teammate claims harassment. HR should be notified immediately if there are any claims of harassment or discrimination.

**Policy Reference:** [insert policy information here]

8. Separating Personal and Client Relationships

A client, **[Insert Company Name Here]**, threatens to withhold all or part of an invoice unless you help them with a personal matter. What would you do?

\_\_\_\_\_Help client with the personal problem

\_\_\_\_\_Advise the client of invoice payment policy

\_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Discussion leader notes:**

* The proper response to this case is “advise the client of invoice payment policies.”
* However, this doesn’t fully solve the dilemma. There may be a way to help the client if the assistance required isn't unethical.
* Generate more discussion about how the conversation with the client might go.

**Policy Reference:** [insert policy information here]

9. Targeted Marketing

As part of a larger word-of-mouth marketing campaign for a large food and beverage client, **[Insert Company Name Here]** has been asked to support a fun online promotion targeting the ‘tween crowd.’ The client identifies a tween as a child between 8-12 years old. The product is perfectly acceptable for this age group. Are you fine with promoting the program?

\_\_\_\_\_ Yes

\_\_\_\_\_ No

\_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Discussion leader notes:**

* The two issues to pay attention to in this scenario are:
  + “Tween” – which generally means kids ages 10-12
  + Online
* All online programs that reach kids under 13 must be [COPPA compliant](http://www.coppa.org/). COPPA is the Children's Online Privacy Protection Act that applies to the online collection of personal information from children under 13 and addresses issues such as privacy, verifiable parental consent and other requirements to protect children's privacy and safety online. Although this is a U.S. law, [insert company name] complies with these standards in all countries in which we do business.

**Policy Reference:** [insert policy information here]

10. Maintaining Trust

You are part of a team pursuing new business for a potential client – and there’s some sensitive information involved. You’re at lunch with a group of colleagues, who are eagerly asking you about the big project you’re working on. What is your reply?

\_\_\_\_\_ Tell them some basic info that doesn’t seem super-confidential

\_\_\_\_\_ Tell them that all the information is confidential and, sorry, you can’t talk about it

\_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Discussion leader notes:**

* The correct answer is, “Sorry, all client information is confidential.”
* Keeping our client’s and potential client’s information confidential is of utmost importance.
* This is clear, it seems, to many of us when we are outside of the office and away from our own colleagues, but it can be and is the same issue when talking with your co-workers.
* In order to secure valuable business relationships, it is important that we meet our potential clients’ expectations in regard to maintaining confidence.

**Policy Reference:** [insert policy information here]

11. Voting Rally

Your client, a non-profit, is neck-in-neck in an online voting contest. With only one day left to vote, you want to rally the **[Insert Company Name Here]** network to help support your client. You decide to draft an email to the entire network asking anyone interested to please vote to help the client win the contest. Is there anything wrong with this approach?

\_\_\_\_\_ Yes

\_\_\_\_\_ No

\_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Discussion leader notes:**

* Yes. Clients hire **[Insert Company Name Here]** to drive organic word-of-mouth success for their respect efforts. Utilizing the entire network is not an appropriate way to promote social/digital client efforts and is in violation of Word of Mouth Marketing Association (WOMMA) code of ethics. The policy (see link) says we will never tell consumers what to say, so it would not be OK to tell employees what to say.
* Using the network for this purpose can create the appearance that we are unfairly “stacking the deck.”
* Rather than using network email for this purpose (where people may simply support the effort because it’s a broad company request rather than being something in which they’re truly interested), the colleagues working on this effort may want to promote it via their personal social media channel AS LONG AS they explicitly disclose that the effort is for a client.

**Policy Reference:** [insert policy information here]

**Ethical Dilemma Scenarios**

12. Sam’s Assignment

A trade association representing a sector of public utilities is concerned about the potentially damaging contents of a forthcoming study by an environmental group. Many expect the study will reveal that the utilities in one region of the country have contributed to fouling water sources, though the environmental group has not let on at all about what is exactly in the report. Your client at the association asks you to undertake some detective work to learn about the findings in advance of their release. He asks you to call the group, posing as a graduate student, seeking information about the study. What do you do?

\_\_\_\_\_ Call the group, posing as a graduate student, and gather and share the information

\_\_\_\_\_ Refuse the client’s request

\_\_\_\_\_ Tell the client you need to discuss this with your CRM or supervisor first

\_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Discussion leader notes:**

* The correct answer is “Refuse the client’s request.”
* Some may indicate to call the boss first or “Other.”
* The intention of this case is to indicate that even though you may be able to get away with something, you should not do it.
* An inappropriate approach in this situation could harm **[Insert Company Name Here]**’s reputation.
* Ask the group for ideas on ways to deal with this situation.

13. Product Safety

You are working on a project to help defend a medium sized client who is being criticized for selling an unsafe product. Midway through the assignment, you begin to suspect your client is not giving you accurate information. You make this assessment from casual conversations you have had from lower level employees. How and to whom do you raise your concern?

\_\_\_\_\_ Go to your supervisor and ask for guidance

\_\_\_\_\_ Write a memo outlining why **[Insert Company Name Here]** should resign the account

\_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Discussion leader notes:**

* The correct answers to this question are, “Go to the supervisor…” or “Other” – you should get participants to articulate the “other” answers they filled in.
* The memo to resign the account is likely premature at this time.
* Ethical approaches indicate that more data is needed.
* Consider sharing Firestone as representative of firm commitment to ethics.

14. Sandy and Jim

Sandy was in a meeting with Jim and their supervisor. Jim has been at **[Insert Company Name Here]** for several years and is a very gregarious individual. In Sandy’s opinion, he seems to talk more than he works. Sandy and Jim are presenting the results of a research study to the supervisor and the supervisor said this is good work. Jim said thanks and that he was the lead person on the research. Sandy knew that the report was the work of a team member and Jim only played a minor role of putting the PowerPoint slides together. Should Sandy speak up now?

\_\_\_\_\_ No, she should wait to talk to her supervisor privately

\_\_\_\_\_ Yes, she should stop the meeting

\_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Discussion leader notes:**

* This issue has to do with respect for fellow employees – if she makes a scene, she is lowering herself to Jim’s standards.
* The correct answer is “No, she should wait…” or “Other” (draw participants out on “Other” answers).
* Ask what aspects of the company philosophy relate to this case. Encourage discussion about appropriate ways to relate to and encourage and support colleagues and the proper way to approach a situation as above.

15. Relevance of the Past

**[Insert Company Name Here]** has been hired by a large and profitable hotel chain that has been subject to negative news stories about the chain’s allegedly unfair treatment of the hotel’s maids and porters. The worker’s discontent has led to union picketing at the hotel and still more unfavorable news coverage. You, as the account executive, have not been able to come up with positive news stories that reporters are likely to use, so you decide to try to neutralize the union's efforts. Your research uncovers information that five years ago the union leader was investigated by federal agents who looked into misuse of union funds. Do you use this information?

\_\_\_\_\_ Yes

\_\_\_\_\_ No

\_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Discussion leader notes:**

* The correct answers are “No” or “Other.”
* The culture of our company is not to seek out “dirt” on people and use it against them. We are successful when we tell *our* clients’ stories … positive things they do, innovation they create, things that differentiate them from the competition – not what may or may not be wrong with the competition or “enemies.” (DO, however, quickly correct misinformation and inaccuracies).
* (You may want to relay a story here about a situation when you, your client or our company did not use negative information).

16. How Much to Report

You have a nonprofit client that asks you to report on its progress in securing donated goods. In a meeting with the staff of the agency, one of the lower level employees questions the accuracy of the amount of donated merchandise. She states that it is much smaller than reported and the executive director says it is only inflated a little. The nonprofit agency says it needs to report on past successes to secure future donations. What do you do?

\_\_\_\_\_ Follow the executive director’s directions

\_\_\_\_\_ Do more checking to substantiate the lower level employee’s statement

\_\_\_\_\_ Talk to your supervisor before doing anything

\_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Discussion leader notes:**

* The correct answers are the second and third options.
* Whether it is a commercial firm or NFP, padding the numbers is unethical.
* While **[Insert Company Name Here]** would probably like to keep this client, it is important not to knowingly pass along inaccurate information.
* Ask the participants how ethical decision rules would relate to this case.

17. What Kind of Press Release?

**[Insert Company Name Here]** has been hired by Behemoth, Inc., a large auto manufacturer. A new model, the X3000, will be in dealer’s showrooms in a few weeks. Behemoth has also hired an independent consumer testing service to evaluate the X3000. The results from its tests, available only to company executives and **[Insert Company Name Here]** staff, are mixed. It praises the X3000 for its styling and acceleration, but it sharply criticizes its low gas mileage and the lack of the latest safety equipment (which is not considered life-threatening). Management asks you to prepare a very positive press release that quotes from the favorable portion of the testing report, while making no mention of the criticisms. The VP of Marketing’s last words to you were: “Be sure to call the car safe.” How do you respond?

\_\_\_\_\_ Use only the favorable information for the press release

\_\_\_\_\_ Prepare a balanced press release

\_\_\_\_\_ Consult with higher level managers at **[Insert Company Name Here]**

\_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Discussion leader notes:**

* The correct answer is likely to be “Consult with a higher level manager at **[Insert Company Name Here]**.”
* In discussion, make note of the importance and role we all play in maintaining our reputation for honesty, transparency and fairness. True, the client would likely be unhappy with a “balanced” press release, and this may not be the place to bare all, but we never lie or mislead.
* Using only favorable information when unfavorable is known may cause problems for the integrity of **[Insert Company Name Here]**.
* Some participants will likely have firsthand experience to relate to the case.

18. Taking an Assignment

**Option A:** The firm wins an assignment to help a client with the public affairs around a development in a country that has been criticized for its human rights record. You have strong views on this issue and consider yourself well informed about the country in question. You are asked by your supervisor to work on this account. Should you accept?

\_\_\_\_\_ No

\_\_\_\_\_ Yes

\_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Discussion leader notes:**

* First, be clear that **[Insert Company Name Here]** is an ethical company and will do nothing that would be a violation of law or of the ethical principles and values that underpin the firm. (Offer example of potential clients who have been turned down or clients that (firm) has resigned in the face of such conflict).
* The answer to this question will probably vary. Some in your group may argue that it is the employee’s duty to work on the assigned client; others will advocate that personal values/principles should not be compromised in this situation.
* The informal policy of **[Insert Company Name Here]** to allow individuals to “refuse to work on clients they oppose” will probably come up and should be reiterated here. Remind your people that when such issues arise, they should direct those inquiries to their manager, general manager or managing director, regional president, or human resource/employee relations department.

**Option B:** Your agency has been approached by a well-financed organization whose members oppose abortion. They seek your help with a national campaign to promote pro-life philosophies. Although you and some other staff do not support these views, you know it would be a highly lucrative account. What do you do?

\_\_\_\_\_ Accept and find people who do not oppose issue to work the business

\_\_\_\_\_ Turn down the business

\_\_\_\_\_ Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Discussion leader notes:**

* The answers to this question will probably vary.
* Some will argue that it is the employee’s duty to work on the assigned client.
* Others will advocate that personal values/principles should not be compromised in this situation.
* How does the overall office workload and staffing affect the situation?
* The informal policy of **[Insert Company Name Here]** to allow individuals to “refuse to work on clients they oppose” will probably come up and should be reiterated here.

19. Employee Layoffs

One of your biggest clients has gone through a period of significant downsizing. Employee morale is low and management has reported to you that some of its best employees may leave to go to a competitor. You are asked to prepare an announcement that employee layoffs are complete. You suspect, based on informal conversations, that this may not be the case. What position do you take?

\_\_\_\_\_ Refuse to prepare the announcement

\_\_\_\_\_ Prepare the announcement as directed

\_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Discussion leader notes:**

* It is important to reinforce that a core value is at play here, and a best practice. **[Insert Company Name Here]** will not compromise its integrity. We should be counseling our clients that not only is intentionally misleading people objectionable on ethical grounds, it is a really bad communications strategy.
* The correct answer is probably “Other.”
* How should we counsel our client to be sure we have all the facts to prepare an accurate release?

20. Award Nomination

Your client has an eye on a particular prize – a coveted CSR award. But, in order to be considered, your client needs to be nominated by another company. Your peer client contact asks that **[Insert Company Name Here]** submit a positive nomination. You’ve worked with this client for one year, with a good relationship. What should you do?

\_\_\_\_\_ Nominate the client

\_\_\_\_\_ Deny the nomination request

\_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Discussion leader notes:**

* You could tell the client that for credibility purposes, we will work with them to identify an independent company to make the nomination.
* This may not be a conflict of interest if we point out in the submission that we are employed by the firm, but this has the potential to impact the judges’ view of the submission.

21. Maintain Client Confidentiality

You come into possession of competitive information of one client, **[Insert Client Company Name Here]**, that you know another client, **[Insert Client Company Name Here]**,would value having. Should you offer a tip to your client contact at **[Insert Client Company Name Here]**?

\_\_\_\_\_Utilize information to improve relationship with the client

\_\_\_\_\_Don’t share the information

\_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Discussion leader notes:**

* The proper response to this case is “Don’t share the information.”
* It’s unethical to use confidential information for any purpose other than the one for which it was given to you.
* Generate more discussion about how a client's trust might be affected by receiving another client's supposedly confidential information.

Policy Reference: [insert policy information here]

22. Twice the Work, Half the Effort

The **[Insert Company Name Here]** team is conducting a social media audit for a client whose audience is young adults. Shortly after the social media audit is concluded, a new client opportunity presents itself. The new potential client is targeting the same audience, young adults. The team working on the new business effort knows about the social media audit you recently conducted for the existing client and asks to review the results to help them with their new business response. Is it okay to share the social media audit findings paid for by the existing client with the team working on the new business effort?

\_\_\_\_\_ Yes

\_\_\_\_\_ No

\_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Discussion leader notes:**

* The answer is that this would only be appropriate if the client who paid for the research approves its use for an alternate purpose.
* Also, some in your group might argue that there is a difference between reviewing the audit and actually including the results in the new business response. Encourage the discussion, but remind them of the right course.
* Urge them to discuss the specifics with your Group Leader before proceeding in any case, should such a situation arise.

**Option B:** You represent a major software maker and a small hosting company. The software maker stages a massive annual event for developers and IT professionals, and pays for 10 media people and bloggers to fly down and attend the event. As a partner of the bigger company, Company B has a stand at the event, and has requested interviews and interaction with the visiting media, giving lavish gifts (including e-readers) as inducement. The dilemma is that the software maker is hosting and paying for the media, but Company B wants to hijack them and hog the headlines. How do you keep everyone happy?

\_\_\_\_\_You don’t. You tell Company B that this is not possible.

\_\_\_\_\_ Propose a solution that Company B have access to selected media outside of the hosts’ critical sessions and interviews. Also, set up interviews that include representatives from both companies to provide a broader discussion and third-party endorsement of each other.

\_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Discussion leader notes:**

* Answer two is a real life example and is the correct answer. We are a communications firm dedicated to finding solutions for our customers. The key is open and transparent communication at all times, and set clear expectations on all sides.
* Some might say it is only appropriate Company B shares the cost. Discuss the specifics with your Group Leader before proceeding in any case.
* Encourage discussion where others may have had ethical challenges about the use and sharing of work and how it was handled.

23. Promoting the Truth

Negative (and personally uncomfortable) claims are being made against your client’s CEO. Your client contact directs you to write some talking points that refute the claims… but he won’t comment, one way or the other, whether they’re actually true. How much more should you press him for additional information? And what’s your move if you can’t get a feel for the true facts?

\_\_\_\_\_ Prod him until he tells you everything.

\_\_\_\_\_ Go ahead and write up what he tells you.

\_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Discussion leader notes:**

* The real question here is “What do you do when you suspect you’re not getting the truth and/or all the information surrounding the issue. “
* Talk with your manager or the CRM of the account on how to handle the request from the client on refuting the claims.
* Do not write anything that is untrue until you have talked with your manager/group leader.
* Do not ever write anything that you know to be untrue. If you suspect the client is not being honest, discuss the situation with your CRM or GM. We should always strongly counsel clients to be honest in all communications for their own credibility. Also, as outside communications counsel, we need to understand the proof points for all talking points, in case the situation escalates to another round. Your CRM or GM can help you understand how to have this discussion.

24. Client Relations

The pressure is on with a current client. The seven-year itch is approaching … and making things even more dicey, the results on a recent project were a bit beneath the client’s expectations. You, as a junior-level member of the team, hear your mid-level manager talking to her client counterpart… and she’s lying about some aspects of the recent project. Do you confront your manager? Or tell her boss? Or keep quiet?

\_\_\_\_\_ Confront your manager

\_\_\_\_\_ Tell your manager’s boss

\_\_\_\_\_ Keep quiet

\_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Discussion leader notes:**

* Are you sure your CRM is being truthful? She may have a broader understanding of the project than you do. It is fair to ask questions of the CRM to make sure she is not correct.
* If, after this, you are convinced that the CRM is not being honest with the client, then you should ask for a confidential meeting with the CRM’s manager. Lying to a client or anybody else is not acceptable. Then let the CRM’s manager correct the situation with the CRM.
* You can have this conversation in a way that highlights your concern but does not “trash” your manager’s overall performance.
* If you have additional concerns, contact HR.

25. Security Breach

Participating in an emergency high-level meeting with your financial services client, you learn a startling fact: there’s been a security breach – one that’s exposed the personal information of millions of people. You are receiving calls from several media resources to provide a statement addressing the issue. The client is emphatic that, for now, they’re going to sit on the information… and bury it, if possible. The client instructs you not to respond to the media calls. Due to NDA, you’re technically unable to report or act on it. What is your counsel to the client? What if they disagree?

\_\_\_\_\_ Consult with your manager or CRM on how to handle this request

\_\_\_\_\_ Ignore the clients request and provide insights to the media

\_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Discussion leader notes:**

* Immediately consult with your manager before emailing or speaking with anyone else within **[Insert Company Name Here]**, at the client or in the media. This is not only sensitive, but it is also potentially a legal issue for the client, and potentially for **[Insert Company Name Here]**. Have your manager or another senior person speak with the client on the issue. The kinds of questions they should explore with the client: What are the facts? Does the corporate legal department or outside counsel know about this situation and what guidance are they giving?

26. Media Coverage

**Option A:** An **[Insert Company Name Here]** office has just taken on a new client and this client desperately wants media coverage to promote the firm. You are an account executive and have heard that it is possible to secure positive stories in the client's local media just by paying for them. How should you proceed?

\_\_\_\_\_ Pay for stories

\_\_\_\_\_ Do not pay for stories

\_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Discussion leader notes:**

* The correct answer is “Do not pay for stories.” (That said, it is important to note there are legitimate paid media distribution/placement techniques, at least in the U.S., such as mat releases, SMTs, etc. We should differentiate legitimate and transparent paid options versus illegitimate or non-transparent paid options. There are countries/locations where some form of payment (China “transportation costs”) may apply. Other locations discussing this should make their people aware of local norms and provide and apply appropriate examples. Not only do we need to review local country practices, we need to understand if the media is owned by the government, then FCPA applies and also the particular kind of media may apply.)
* **[Insert Company Name Here]** corporate practice forbids paying the media directly – it could be seen as a bribe. (Note: as above)
* You should probe for what might be ethical avenues to follow – try to develop relationships with local media, draft stories and meet with media individuals, create newsworthy special events, etc.

**Option B:** You learn that a publication is about to publish a story with information that is highly embarrassing to your client, yet true. Your client leans heavily on you to get the story killed. It turns out that the editor who oversaw the reporting is someone you have known and worked with for years, and you and he have a good rapport. Indeed, he “owes you one” since you have steered several exclusive interviews and other good information his way enabling him to scoop his competition. What do you say to the editor?

\_\_\_\_\_ Tell him it would really be a big favor if you would just kill this story

\_\_\_\_\_ Level with the client in a diplomatic fashion and provide our best effort to manage and rehabilitate the client’s reputation once the story is out

\_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Discussion leader notes:**

* Participants will have opinions about the first and third and other answers. Many of us have faced a similar issue and have sought help from our media contacts
* While there is nothing wrong with leveraging a relationship, as long as nothing illegal or unethical is done to secure a commitment, the reality is that even with a good relationship ,it will be difficult or impossible to get a story killed entirely. Even if you do, you will surely do damage to the relationship. From an objective perspective, if the story is entirely true and the journalist has uncovered the information and reported it honestly and fairly, it is highly unlikely that the editor will kill the story, knowing it could hurt his career and that of the reporter who worked hard to generate the story.
* You should probe for what might be ethical avenues to follow up and try to develop relationships with local media: draft strategies, tactics and stories, create newsworthy special events, etc. to strengthen and grow reputation before and after the story is published

27. Opinions about the Competition

You are an account executive at **[Insert Company Name Here]** competing with one of **[Insert Company Name Here]**’s fiercest rivals for a big corporate account. This potential business would add significantly to the bottom line and could be a boon to your career. You are asked by the potential client to comment on the abilities of the competitor, which, in your opinion always overstates its competencies and accomplishments. What do you say?

\_\_\_\_\_ Tell the person that it is company policy not to comment on competitors

\_\_\_\_\_ Refer the person to one of your accounts that you know had a mixed experience with the competitor

\_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Discussion leader notes:**

* The correct answers to this question are, “Tell the person…” or “Other.”
* **[Insert Company Name Here]** does not disparage competitors and does not want its clients doing so either.
* Those who answered “Other” may take the position that is much better to discuss **[Insert Company Name Here]**’s strengths and not the competitor’s weaknesses. If this does not come up, you may want to ask those participating how a negative could be turned into a positive.

28. Dealing with Client Conflict

**Option A:** Joe, a new account manager, receives a telephone call from the vice president of marketing for a major consumer packaged foods firm. The company is currently not a client of **[Insert Company Name Here]**, but **[Insert Company Name Here]** does represent a direct competitor on one of their product lines. The VP tells Joe that he would like **[Insert Company Name Here]** to bid on a contract for PR and a website for a new line of products that on its face does not seem to compete. Joe’s manager is on vacation and the VP wants a proposal before she returns. Joe is uncertain whether he should instruct his staff to begin working on a proposal. What do you think he should do?

\_\_\_\_\_ Tell staff to begin working on a proposal

\_\_\_\_\_ Call the competitor and explain the situation to that firm

\_\_\_\_\_ Call the manager on vacation for guidance

\_\_\_\_\_ Go to your manager’s manager and discuss the situation

\_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Discussion leader notes:**

* The correct answers to this question are “Call the Manager” or “Other.” Qualify this discussion by making sure a new account manager should not automatically start preparing a pitch. Communication should be handled by and between account leaders and general managers. Most GMs want to know if there is a conflict and they quickly discuss and determine who and how clients/competition should be managed.
* **[Insert Company Name Here]** corporate practice forbids taking on a potential client without clearing it both with the existing client and management.
* You may want to brainstorm with the participants about possible strategies or stories where such a situation occurred and how it was handled ethically.

**Option B**: Company A, a prominent pharmaceutical company would like to hire your firm to help it communicate its position on a complex regulatory matter pending at the Food and Drug Administration (FDA) in Washington that could affect its “blockbuster” drug. Company A is offering to pay you a reasonably good monthly retainer for the work, revenue that you need at a time when the economy is softening. But it is not nearly as much money as you are making from Company B, which produces a product that is a direct competitor to the Company A’s “blockbuster” drug. You represent Company B’s product on other regulatory issues in Washington, but not the same pending matter at the FDA. One of your firm’s senior managers recommends that you not inform either of the two companies of your relationship with both. He reasons that there is no real conflict of interest here, and, besides, there will be a strict “firewall” between the two teams working in the same office for each of the clients (that is, no sharing of information about either client). But you know that both companies are extremely sensitive about anything that might support its competitor’s drug. Did the senior manager make a good call?

\_\_\_\_\_ Yes

\_\_\_\_\_ No

\_\_\_\_\_ Not sure

\_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Discussion leader notes:**

* Specifically as relates to pharmaceutical clients, the issue is that the representation of clients and their various drugs/products is likely to be public due to various disclosure requirements. A firm’s senior manager is not the deciding factor but is key in any and all pharma conflicts. It is important to quickly contact the pharma and healthcare lead in the firm and have GMs and CRMs involved in the conversation: 1) confirm with Legal what is in the contract 2) concurrently consult with healthcare/pharma lead, and 3) involve GMs and CRMs in the discussion without violating any confidentialities or firewalls.
* Encourage discussion in a *general sense* … as some in your group may point to the contractual requirements regarding non-competes. Some people will say absent contractual language, we have no obligation that would prevent us from the work and it was a good call; and yet others may argue that transparency is key, and a surprise to either client at a later date could risk both accounts.
* Those who answered “Other” may take the position that is much better to discuss **[Insert Company Name Here]** values of openness and transparency and how a negative (losing Company A’s business initially could be turned into a positive (strengthening Company B’s relations and even winning both companies eventually).

29. Transparency Not Just a Social Media Issue

A developer hired us to help forward the idea of the city committing funds to using a derelict property downtown to commence a new attraction. There were public hearings on the topic. We attended to monitor for him, and even worked to get third parties to speak in favor of the idea. We also invited the media, working with the pertinent beat reporter at the local newspaper. We were under strict instructions to not reveal that we were representing him. That information would have tainted the proceedings as the story of our employment would have been the news of the day. “Developer hires PR firm to influence city action in his favor.”

We accepted the assignment based on his promise that we could reveal his involvement “soon.” It went on longer than expected. Finally, the newspaper reporter asked us for whom we were working. If we said, “We can’t say,” it would be a red flag. If we said, “For one of those third parties,” it would be a lie. If we said, “For the developer,” it would become the story. What should you do?

\_\_\_\_\_ Tell the reporter we can’t say

\_\_\_\_\_ Tell the reporter for one of the third parties

\_\_\_\_\_ Tell the reporter for the developer

\_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Discussion leader notes:**

* Here’s what happened. We told her, “You’ll know tomorrow.” And we drafted a release announcing his interest in the project. We sent it to him with a note saying we were issuing it that evening. No discussion. He could either have this much control over the story (by announcing it himself) or he could fire us. His call.
* The developer agreed.
* As above, transparency is key, lies are unacceptable, values will win, and reputation and credibility are everything.
* Encourage discussion. Those who answered “Other” may have other related stories to draw out.

30. New Business vs. Existing Clients

Cheryl has been working on a customer event her manufacturing client has had planned for several months. The client is one of the more respected firms in the office for its size, longevity and steady growth in budget over the past decade. Cheryl is skilled and experienced in several B2B capabilities and has worked evenings all week, with two weeks to go before the event. Her client is very happy with the progress being made. This morning, Cheryl was called into a meeting with her supervisor and the office manager and asked to lend her special talents for the next four days to assist a new business team that has been asked to respond to a new branding RFP for a nationally-recognized food company. Landing this client would be an important win for the office. She will be expected to devote more than half her time to this new effort. Fearing that all her hard work on her client event could be harmed if she is pulled away, she complains to her colleagues that her managers can’t seem to decide priorities, and she debates declining to participate in the new business effort. What should Cheryl do?

\_\_\_\_\_ Decline the new business and bring home a winning event for her client

\_\_\_\_\_ Talk with her supervisor about her workload concerns

\_\_\_\_\_ Take no action and continue to complain

**Discussion leader notes:**

* The correct answering is, “Discuss workload issues with supervisor.”
* It is doubtful that any manager or account leader would knowingly sacrifice or undercut existing client in place of or in favor of new business.
* The question they (and we all) face is how to achieve the right balance in allocating finite assets to continue to do quality work *and* seize immediate new opportunity.
* How can they both be a priority? Can they live in the same space with the other in practical daily application?
* If you have not yet faced a situation that has led you into this conversation with a colleague or a supervisor yet, I suspect in time you will.
* We grow only two ways: expanding the scope of services and capabilities we provide our current clients or adding new clients to our roster. You may not realize that on average we turn over about 30 percent of our client base each year. By necessity we have to be doing both of these at the same time.
* Like any activity in your workload, where and how you divide time is a priority based on a range of needs and resources and assets that exist in balance. There will be conflict. It is the nature of what we do and is reflected in these two precepts.

31. Intellectual Property Precautions

You are producing a marketing video for a client for the first time. The client is introducing an innovative new product and there is a lot of industry buzz. You find a location that is eclectic and interesting, an entrepreneurial, collaborative workspace – lots of individuality, lots of self-expression. Your team shoots the video. It is wonderful and vibrant. Then your colleague notices that there are colorful athletic shoes on a table in the foreground and the logos of three major brands are on shoes in front and center on the screen. The brands have nothing to do with the client’s product. You’ve already shown the client team the video and they love it – especially the vibrancy and colors. What is your next step?

\_\_\_\_\_ The video is for a social media campaign and won’t be seen by an extremely large external audience so, it’s fine to

use in this case

\_\_\_\_\_ Get advice from an expert or senior manager

\_\_\_\_\_Explore other options - find out the cost for leaving the marks in, reshoot, fuzz out the marks, or edit the video so the

marks are no longer visible

**Discussion leader notes:**

• The correct answering is “Get some advice from an expert of senior manager on next steps” or “explore other options” that would hide the logos/brands.

* Permissions from those brands to feature their products in the video weren’t granted. While this may seem very minor, it can be a serious legal issue. Bottom line: if you feature any kind of products/logos/brands/pictures/music, etc. make sure you have the rights to use them before releasing any work product.

• Intellectual property has become a growing legal issue in the US and other countries. Double check with a senior leader or legal counsel if you are unsure what you need to look out for when it comes to intellectual property.

**Social Media Scenarios**

32. Sharing a Compliment

A third party blogger sends feedback to you via a direct message on your personal Twitter account (a private message) raving about a particular **[Insert Company Name Here]** client’s campaign. You decide to share this information with other members of the **[Insert Company Name Here]** team as an FYI and they want you to take a screenshot of the direct message from your personal Twitter account to share in a client presentation. Is the account team’s request appropriate?

\_\_\_\_\_ Yes

\_\_\_\_\_ No

\_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Discussion leader notes:**

* As there is a possibility in this case that sharing the private communication could result in it potentially be used or discussed externally by the client, best practice would be to ask the blogger if he/she minds you sharing the positive feedback from the private communication.

33. Tweeting for Others

An **[Insert Company Name Here]** colleague has more than 40,000 followers on Twitter and one of his/her tweets can potentially result in over one million impressions. You’ve set a goal of 5 million impressions for a specific hash-tag created for a client campaign. You’re about 2 million impressions short and the campaign ends in three days. Do you ask your colleague to “do you a favor” and tweet it for you?

\_\_\_\_\_ Yes

\_\_\_\_\_ No

\_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Discussion leader notes:**

* This is not appropriate. Our clients pay us to generate organic word-of-mouth for their efforts.
* Further, if the **[Insert Company Name Here]** colleague with 40,000 Twitter followers decided to tweet about this effort because he/she truly found it interesting (and was not prompted to tweet about it by a colleague working on the business: always inappropriate), he/she would be required to state in the tweet (or any social media communication, such as Facebook status update or blog post) that **[Insert Company Name Here]** represents the client. TRANSPARENCY OF RELATIONSHIP IS PARAMOUNT TO OUR CREDIBILITY IN SOCIAL MEDIA.
* **[Insert Company Name Here]** cannot risk looking like it “stacked the deck” by raising the level of success or impressions for the effort. It is not a best practice and this example would be considered inappropriate by social media best practice standards.

34. Personal Endorsement

You are excited to be promoting an **[Insert Company Name Here]** client’s new gardening product, Product X. Product X truly is revolutionary, you really believe in it, and you want to share the news with your personal Facebook network, which includes some friends from around the **[Insert Company Name Here]** network. You publish the following status update on your personal Facebook page:

*“Check out Product X. It is one of the most amazing things to come along in the gardening world in the past 10 years. Don’t believe me? Just visit* [*www.ProductX.com*](http://www.ProductX.com) *and let me know what you think!”*

Is it appropriate to share a status message of this nature on your personal Facebook page (or personal Twitter feed or personal blog)?

\_\_\_\_\_ Yes

\_\_\_\_\_ No

\_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Discussion leader notes:**

* No, it is not appropriate because the **[Insert Company Name Here]** colleague posting this client promotion does not explicitly state that he/she is working for the **[Insert Company Name Here]** client.
* A 100% transparent statement must always be made when a counselor for **[Insert Company Name Here]** promotes a client effort in social media on which he/she is directly working. Making the relationship obvious and transparent is of paramount importance.
* The appropriate way to post this information on a social media channel would be, “Check out Product X. Product X is one of my clients at **[Insert Company Name Here]**. Product X is one of the most amazing things to come along in the gardening world in the past 10 years. Don’t believe me? Just visit [www.productx.com](http://www.productx.com) and let me know what you think!”

35. Social Media Support

Your team has just begun work with a new client who has made it clear that their number-one expectation is for some social media success. Your supervisor asks you to go online – to various websites, bulletin boards, ratings/reviews sites, Twitter streams – and insert yourself into the conversation as a “regular person.” Your charge is to comment positively about the client’s product and the company overall. Are you okay with this?

\_\_\_\_\_ Yes

\_\_\_\_\_ No

\_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Discussion leader notes:**

* The correct answer is that you should not be okay with this.
* **[Insert Company Name Here]** does not condone deceptive online posts or posing as someone else on the Internet.
* Transparency of opinion and identity is a hallmark of social media.
* Posting anonymously or as anyone other than yourself is strictly prohibited.
* (Add: What you should do about the supervisor’s request.)

36. Blogging Incentive

You’re performing some online editorial outreach with a number of key bloggers. One suggests he’d be willing to provide coverage about your client – particularly if there was a “gift card” that might accompany the media kit. What’s your next step?

\_\_\_\_\_ Give the blogger a gift card

\_\_\_\_\_ Deny the blogger

\_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Discussion leader notes:**

* Our primary objective is to generate earned editorial coverage for clients. But as the blogging landscape continues to evolve, many bloggers expect some sort of compensation for their time. It may be ok to provide the blogger with a gift card depending on the amount of money involved. However, never agree to give a gift to a blogger without advance approval by your manager. Recommendation is to discuss the opportunity with clients to determine their interest and willingness to pursue paid blogger partnerships. Work with the client and designated **(firm)** social media leadership representative to assure proper disclosure as needed.
* **[Insert Company Name Here]**’s gift policy warns about accepting or giving gifts which may create a sense of obligation to the client.
* Any gift of this nature or any gift that is valued at more than $100 dollars should be approved in advance by the chief financial officer.
* Further, we must always – in writing – ask the blogger to disclose that gift cards or any “benefit” are being provided by the given client within the body of the blog post promoting the client’s effort.
* *(Or, if applicable …****[Insert Company Name Here]*** *does not buy media coverage or provide gifts in exchange for media coverage.)*

37. Damage Control

You receive a phone call from a key client who is fuming over some outrageously false and libelous information that’s been posted about the company’s CEO on their Wikipedia page. “Get it off there… now! I don’t care how – the truth is the best defense!” She goes on to suggest the best route is to just create a generic user name and edit the copy out. What’s your response?

\_\_\_\_\_ Create a generic account and edit out the comments

\_\_\_\_\_ Explain that anyone can post anything on Wikipedia

\_\_\_\_\_Talk with your manager about the appropriate messages to the client

\_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Discussion leader notes:**

* The correct answer is talk to your manager about the appropriate messages to the client.
* Wikipedia discourages PR professionals from contributing, although it does not actively prevent them from doing so.
* You can also work with the client to correct the information in Wikipedia.

**Policy Reference:** [insert policy information here]

38. Disclose or Not to Disclose?

Your team recently won a competitive pitch to launch an integrated campaign to promote a fashion brand’s new apparel line. The campaign includes partnering with online influencers to review the clothes in exchange for free product.

One of the blogger partners writes a positive review of the new jacket on her blog and mentions that she received it for free from the company. In the post she links to her Instagram post where she is wearing the embroidered jacket with the company logo but does not mention the brand in the Instagram post copy. What do you do?

\_\_ Nothing. We aren’t paying the bloggers, we’re just giving them free clothing so they can review the product.

\_\_ It’s up to the blogger to disclose their relationship with the brand. She mentions that she got the clothing for free in the

blog post so there’s no concern.

\_\_ Ask the client to consult their legal team for advice.

\_\_ Contact the blogger and ask her to update the Instagram post to disclose that she received the jacket for free.

**Discussion leader notes:**

* The correct answer is “Contact the blogger and ask her to update the Instagram post to disclose that she received the jacket for free.”
* In the US, the FTC has strict guidelines around advertisements and marketing. Please visit this site for more information: <https://www.ftc.gov/tips-advice/business-center/advertising-and-marketing>
* Note that disclosure is required in EVERY post. Even though the blogger is transparent about her relationship with the brand in the blog post, the Instagram post lives on its own and must also include the proper disclosure.
* Always consult with your manager, social media expert or legal counsel on disclosure guidelines.