

Brandle Category & Tag Strategy

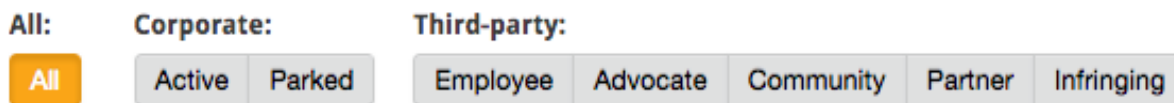
How to create an organizational strategy to manage your Inventory, process work-in-progress, Tag and categorize people and POPs, and deliver stellar reports.

Setting your Social Networks

Brandle automatically categorizes your POPs by social network (for the APIs Brandle accesses) and for websites and domains. To add additional networks to your Inventory for 100% coverage, you will need to add the URLs of your additional social networks in the Admin Tab under Other POP Types.

Setting your Inventory Categories

Brandle has seven (7) key category “buckets” for you to segment your social accounts and websites. The default categories are stated as either Corporate (Active and Parked) or Third-party (Employee, Advocate, Community, Partner, and Infringing).



An Administrator for your account can change these category titles to fit your business needs, but we recommend you maintain the Corporate Active and Parked (where you can place reserved accounts or network-generated accounts like Place pages), and Infringing (which hold your key counterfeit and risk accounts). Most companies also keep an Employee category and Community category.

The decision for how you will categorize your social accounts and websites into these “buckets” is your priority organizational decision to define “what type of account is this”?

Creating Tag Categories and Tags


Brandle has a rich tagging system that allows you to define how you want to work and what you need to report on to deliver strong digital governance and social media security to your corporation. Tags can be applied to both POPs and Contacts, so it is important to understand what you want to accomplish using tags in each of these areas.

For POPs, you will want to define how your company and team may want to track, govern, and report on a single POP or group of POPs (like a brand or business unit). You may also further define a Contact with tags such as the location of the person, the brand or business unit they are attached to, or process tags such as “ex-employee” so you can see which POPs a contact was managing so you can find the new contact for future communication. Tag Categories and Tags are all in the same place and are not segment by POP or Contact tags;

so you would be applying the same Tag of a Business Unit to a POP and to a Contact. This is your corporate tag strategy.

Brandle Default Tag Categories and Tags

Brandle has several Tag Categories and Tags prepared for your use at the start of your account creation. They are location based (country and region) and process based (audit process). You will want to review these tags to see which ones you wish to use and which ones you can delete if you will not use them. For example, Brandle has a list of all countries as tags, but perhaps your corporation does not operate in all countries: you will want to delete the superfluous countries



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Keybank, N.A.

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Create New Tag Category

Showing 1 thru 6 of 6 total Categories.

Tag Category	Total Tags	Background Color	Text Color
Audit Appeal	4	#B6CF8A	#262626
Audit Plan	6	#B6CF8A	#0F7001
Audit Result	6	#B6CF8A	#B03B3D
Country	241	#812728	FFFFFF
Reach Form	4	#EAAF55	#262626
Region	10	#00007D	FFFFFF

Show 25 entries

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The Reach Form tag should not be deleted until you understand Campaigns and Forms and see how the tagging system works with these forms.

The Audit Tags for the above Audit Categories are:

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Inventory Discovery GRC ▾ Contacts ▾ Forms ▾ **Tags ▾ Tags** Company ▾ Account ▾

Create New Tag

Showing 1 thru 16 of 16 total Tags.

Q ▾ audit

Tag	Tag Category	POPs	Discovereds	Contacts
Delete	Audit Plan	0	0	0
Deleted	Audit Result	0	0	0
Denied	Audit Appeal	0	0	0
Granted	Audit Appeal	0	0	0
In Review	Audit Appeal	0	0	0
Merge	Audit Plan	0	0	0
Merged	Audit Result	0	0	0
Park	Audit Plan	0	0	0
Parked	Audit Result	0	0	0
Publish	Audit Plan	0	0	0
Published	Audit Result	0	0	0
Redirect	Audit Plan	0	0	0
Redirected	Audit Result	0	0	0
Requested	Audit Appeal	0	0	0
Unpublish	Audit Plan	0	0	0
Unpublished	Audit Result	0	0	0

You may get some ideas from this list of how you can use tags to process work and communicate that process to other team members. If you prefer different language, feel free to change the Tags by clicking the 3-bar action menu to edit the name. However, if you know you do not want to use a specific tag, do delete it so other team members aren't tempted to apply it in the future.

Tags for POPs

Each corporation has a different management structure, but almost all companies have a need to tag POPs for the business unit, geographic region, and brand the POP represents or associates with. Additionally, the Administrator and Governance team will want to apply governance-type tags that assist with the process of auditing and governing your global social footprint.

Developing your tag strategy is an important process as it will help you create the strongest reports to govern, manage, and measure your digital footprint (including all of those people who associate with your company and



brands). It's worth the time to consider what reports and processes you will need monthly, quarterly, or as a matter of process (such as creating a report on all of the POPs that need to be merged into a Facebook Global Pages account).

Below are several tables of Tag Categories and Tags that may be helpful to you. This is not a suggestion to create all of these Tag Categories and Tags (unless they are all meaningful to your business and process), but is meant to offer ideas on how a tag strategy might work for you, your team, and your company.

The header row is the Tag Category and the column beneath the Tag Category are suggested Tags.

General Corporate Tag Categories and Tags

Table 1 is a suggested direction for Tag Categories where the Tags would be individual to your company or a default category by Brandle

Business Unit	Brand	Geography/ Country	Reach Form
Your Corporate Business Units	Your Corporate Brands	Your Corporate Countries or Regions. If you need multiple geographic tags, consider creating a Tag Category for Country and a Tag Category for Region with appropriate tags for each.	Brandle creates this category for the Forms submitted via link or campaign. Once you name a form, Brandle will create a tag for the reach form and place it in this Tag Category.

Additional POP Categorization

Although you have created a priority categorization using the Inventory Categories, you may need to define your POPs with additional Tags. For example, if you are a regulated company, it is likely that you have a need to define employee type. Each company manages these differently, but these suggestions should give you an idea of where to start.

Employee Type	Account Status-type	Partner Type	Community Type
Executive	Active - Official	Sponsored Event	Advocate
Certified Social (Ambassador)	Active - Approved	Reseller	Sponsored Advocate
Not Certified Social	Pending	Certified Professional	Brand community
Mortgage Loan Officer (Regulated)	Place Page		Complaint Community
Securities Manager (Regulated)	Community Page		
Wealth Manager (Regulated)	Website-inactive		

Employee Type	Account Status-type	Partner Type	Community Type
	Closed		
	Private or Protected		

Governance Tag Categories and Tags

These Tag Categories and Tags help you process governance and manage risks. These are items that are part of workflow with other team members and other business units (such as the risk and governance teams). These tags will give you some ideas for how you want to process governance within Brandle, and how you might use these tags to filter and run reports.

Attached Tools	Risk Assessment (Align with Risk Team)	Audit Process	Audit Remediation (after process)	Brand Audit
What tools are attached for publishing, archiving, password, etc.	Legal for IP Infringe	To Merge	Merged	Change Avatar
	Legal for Take Down	To Redirect	Deleted	Update referenced website
		To change Referenced Website	Parked	Update Cover Photo
		To Migrate		Update Descriptor
		To Add to Global Pages or Business Account		
		To Take Down		
		Employee notification		
		Make Private		

Mortgage Industry Tags

The compliance requirements for the Mortgage Industry are very specific and you will want to tag your employees and their POPs in a specific manner. Much of the compliance work is created in Compliance module (Criteria and Issues), but tagging is an important element to be able to run clean reports on Loan Officers, Branches, and States (for you and for auditors).

Subsidiary or DBA	Branch Office	Home State	Origination State	Title
Are there multiple brand names listed for the parent company?	Apply Branch office code to POPs and contacts.	The state where the person/ LO resides.	List States and apply all origination state tags to a person and their POPs	Branch Manager
				Regional Manager
				MLO

Contacts and Team Members

The last area of organization is to know who in the company (or agency) is responsible for managing each POP. Brandle allows you to manage your primary contact and their email in the Contacts Tab. Here you can upload all contacts and their associated email addresses that you may need to communicate with regarding a POP (whether it is a governance team member or a regulated employee).

Once you have these contacts in Brandle, you can place Tags on them (such as their business unit, geography, and brand association). Brandle allows you to associate the Primary Contact in the Inventory tab for each POP so you can have easy access to them for communication on a Note.

You can have several contacts on each POP by selecting the Role they play, such as primary, secondary, or legal role.

Creating a powerful Brandle organization and tag strategy helps you and your team members stay organized, *and* ensures that you will generate meaningful reports showing the process of governance and how you are managing risks for your corporation!