



# 2010 Social Media Use Survey

## Updated Report Findings

Updated: 20 October 2010

By: Terrance Barkan CAE | SOCIALSTRAT

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**Social Media has changed how people  
communicate and relate with one another.**

**Does your organization have a plan?**

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*SOCIALSTRAT is a division of GLOBALSTRAT, a leading independent provider of professional advisory services for the not-for-profit community on the subjects of Social Media Strategy and International Strategy Development. Terrance Barkan CAE is the Chief Strategist and Business Architect, applying more than 20 years of business and international not-for-profit experience crafting solutions to complex problems.*

*This report may be freely distributed in whole and unaltered.*

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**WANT TO SHARE THE SURVEY LINK WITH A COLLEAGUE?**

**<http://Ez.com/SMSurvey>**

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# Executive Summary

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More than 900\* organizations have taken our social media use survey, making this one of the most comprehensive studies on social media use by organizations. The responses are primarily from the professional and trade association sector, however, it also contains significant responses from for-profit corporations, government entities, academic institutions and others, providing a rich mixture of information for comparison.

This updated report provides a snapshot of how organizations are using, or are planning to use, social media. We provide an overview of the results per each question, as well as by Professional Associations, Trade Associations, Companies and Other for comparison. The report can be used as a benchmark against which to measure your current social media activities.

This most recently collected data indicates that:

- Respondents are using a broad range of resources to inform themselves about social media. For associations, "ASAE and The Center", LinkedIn and professional networking sites are their primary sources with more than 60 different sources cited in total.
- Only a minority of organizations have actually implemented a social network platform, with most organizations depending on external rather than internal social technology platforms. (Note: We feel this approach is a potential pitfall if not backed up by a robust private social network that is integrated with the organization's AMS or CRM.)
- Email distribution lists and Listserves are by far the most widely implemented tools but the use of Wiki's, social media sites, and blogs are rapidly growing.
- Organizations are dependent primarily upon only 3 sources of revenue: Banner Ads on their website, webinar and electronic newsletters. (New sources of revenue from User Generated Content are not yet being realized.)
- The vast majority of organizations have no dedicated budget for social technologies. The majority of those that do have a social media budget include it as part of the Membership, Communications, Marketing or IT departments.

Social Media is a combination of opportunity and risk, raising important questions:

- How do we measure the real potential of social media for growth and engagement?
- What is our legal liability or risk, and how do we manage these risks?
- How do we build our internal capacity to manage these new technologies?
- How do we assess the new environment with emerging, non-traditional competitors?
- How do we avoid critical mistakes and pitfalls as we start to use these new tools?

This report, together with other resources, training and professional guidance, will help you and your organization to create, implement and manage a Professional Social Media Strategy.

## Social Media in Perspective

Social Media represents a fundamental change in the way that organizations and individuals relate and communicate with one another. Social media drives greater transparency, a need for honesty and humility, pull versus push communication, and the ability to release a significant degree of control. These changes are being applied equally across the globe, impacting government, business, civil society, media, and especially individuals.

BlackPlanet.com, **Flickr.com**, Reunion.com, aSmallWorld, **Bebo**, Blue Dot, Bolt, Broadcaster.com, Buzznet,  
CarDomain, Consumating, Couchsurfing, Cyworld, **Dandelife**, DeadJournal, DontStayIn, Doostang,  
Ecademy, eSPIN, **Facebook**, Faceparty, Flickr, Flirtomatic, Fotki, **Friends Reunited**, Gaia Online,  
Geni.com, GoPets, Graduates.com, **Grono.net**, Hyves, imeem, **Google**, Infield Parking, IRC-Galleria, iWiW,  
Joga, Bonito, Last.fm, LibraryThing, **LinkedIn**, LiveJournal, **LunarStorm**, MEEtin, MiGente.com, Mixi, MOG, Multiply,  
**My Opera Community**, myYearbook, Netlog, Nexopia, **OUTeverywhere**, Passado, Piczo, Playahead, ProfileHeaven,  
Pownce, **RateltAll**, Reunion.com, Searchles, Sconex, Shelfari, Soundpedia, **Sportsvite**, Studivz, TagWorld,  
TakingITGlobal, The Doll Palace, **The Student Center**, Threadless, TravBuddy.com, Travellerspoint, Tribe.net,  
**TWITTER**, WebBiographies, Windows Live Spaces, Woophy, **XING**, Xuqa, Yelp, Zaadz,

“Social Media” has emerged as the most significant and disruptive trend of our time by dramatically changing the expectations of consumers, by disrupting business models and creating new models (based on “FREE” or Fremium services). The individual and his/her collection of friends and contacts have been empowered to wield greater influence than ever before. Organizations need to learn how to live and thrive in a world where false steps as well as success can be broadcast far and wide in an instant. These changes demand a different approach, a different strategy and new skills.

Most of the attention continues to be focused on superficial topics or the technological aspects of Social Media; how many people have a Twitter account?; should we have a Facebook Fanpage?; What is the hottest new application, widget or tool?

What is missing is a framework for a Professional Social Media Strategy.

Social Media is ideally designed to build community and membership. While many US based organizations have exhausted much of their potential client base in the US, the rest of the world represents an enormous potential for growth. The challenge in the past has been that the international market was both hard to identify and hard to reach. The Internet and social media have effectively eliminated these barriers.

## Internet – the platform for social media growth

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The numbers are staggering:

550 Million Facebook users (representing every demographic and geography...)

85 Million LinkedIn users (mostly highly educated, well compensated professionals...)

1 Million social networks on Ning ( a platform to create a social network...)

180 million “smart phones”

2.0 Billion individuals with Internet access...

...and these numbers are continuing to grow at an aggressive rate

The “Social Web” continues to grow and expand as the reach of the Internet explodes globally. Access to the Internet that is widely available and reliable is taken for granted. Today, we expect an Internet connection almost in the same way that we expect electricity and clean water.

In January 2006, the world had reached the threshold of more than 1 Billion Internet users. Less than 5 years later, that figure doubled! (Please refer to [www.Internetworldstats.com](http://www.Internetworldstats.com)).

WORLD INTERNET USAGE AND POPULATION STATISTICS						
World Regions	Population ( 2010 Est.)	Internet Users Dec. 31, 2000	Internet Users Latest Data	Penetration (% Population)	Growth 2000-2010	Users % of Table
<a href="#">Africa</a>	1,013,779,050	4,514,400	110,931,700	10.9 %	2,357.3 %	5.6 %
<a href="#">Asia</a>	3,834,792,852	114,304,000	825,094,396	21.5 %	621.8 %	42.0 %
<a href="#">Europe</a>	813,319,511	105,096,093	475,069,448	58.4 %	352.0 %	24.2 %
<a href="#">Middle East</a>	212,336,924	3,284,800	63,240,946	29.8 %	1,825.3 %	3.2 %
<a href="#">North America</a>	344,124,450	108,096,800	266,224,500	77.4 %	146.3 %	13.5 %
<a href="#">Latin America/Caribbean</a>	592,556,972	18,068,919	204,689,836	34.5 %	1,032.8 %	10.4 %
<a href="#">Oceania / Australia</a>	34,700,201	7,620,480	21,263,990	61.3 %	179.0 %	1.1 %
<b>WORLD TOTAL</b>	<b>6,845,609,960</b>	<b>360,985,492</b>	<b>1,966,514,816</b>	<b>28.7 %</b>	<b>444.8 %</b>	<b>100.0 %</b>

The ability to launch and grow a global community has never been as easy and accessible as it is today. The good news is that the barriers to do so are low (broad Internet access, high acceptability of social media tools, free or very inexpensive hosted applications, etc.). The bad news is that because the barrier to entry is so low, there is inevitably more competition for targeted professional or customer communities.

The explosion in information coming from a seemingly endless stream of new outlets (blogs, online groups, virtual news agencies, etc.) makes it increasingly difficult to be heard above the noise. Associations and businesses alike are under threat if they do not learn how to leverage this new environment in their favor.

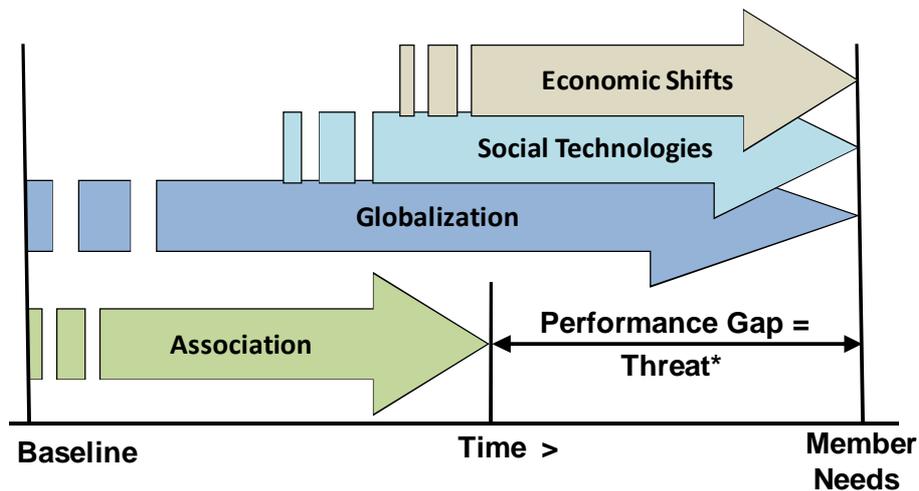
## Social Media Strategy & Management

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Many organizations struggle to achieve growth. Often this is because they have already penetrated the majority of the readily available market and have hit a plateau. New opportunities, including international markets that are not well served by a local organization, can often offer the best opportunity for growth.

In the past, identifying and growing new markets was expensive and time consuming. Social Media offers the opportunity to cost effectively grow through peer to peer, Word of Mouth marketing within your existing customer base, accessing new groups of prospective clients and members through smart messaging and community engagement.

### Is your organization keeping pace?



Today, there are three very disruptive forces at work; economic turmoil, rapid evolution in the growth and adoption of Social Technologies and the constant advance of globalization. These forces are changing organizational behavior and structure in ways that are not always apparent.

Social technology is the only one of these three forces that is both an environmental agent of change and a means to cope with that change. For those that learn how to master this powerful tool, the opportunities are limitless. But first, you must have a plan...

***“Nothing Endures but Change” - Heraclitus (c. 535BC – 475BC)***

## How to use this report

When starting your social media strategic planning considerations, you might want to start with these key questions:

- What is the ultimate objective of my organization and how can social media support that mission? Have we defined and segmented our target market correctly?
- Does my organization have a defined Intellectual Property strategy? Do we understand where and how we have created content in the past and how that will change in future?
- How can I integrate a Social Media strategy into our existing communications channels to get maximum effect?
- What new knowledge or skills will my organization require to manage our social media activities? What impact will using social media have on our structure and staff?
- How will I measure results and ROI on social media?
- What pitfalls can I anticipate and avoid as we implement change?
- What technology choices will we be making – internal versus external or public platforms? How will these platforms integrate with our existing systems?
- What are the new opportunities unlocked by social media and how do we measure their true potential? How do we make sure we capture these opportunities?
- How do we prepare ourselves, our staff, our volunteers, our members, our customers and our partners to make the most of social networks?
- Do we have the capacity and resources to realize our ambitions or can we benefit from the experience and skills of others?

As organizations confront the many issues posed by social media they will be forced to ask themselves critical questions about their future. Staff and volunteers will need to work closely to define their future and to make the changes needed to succeed. We highly recommend that you refer to the “Successful Social Networking Strategy” white paper in conjunction with this survey report. Please contact us if you would like learn how professional assistance in crafting your Professional Grade Social Media Strategy will help you to get ahead of the game.

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[www.socialstrat.org](http://www.socialstrat.org)

## Q 1. Types of organizations that replied to the survey

What types of organizations replied to the survey?

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Fig. 1

Professional and Trade Associations make up 80% of the total respondents in the survey, which is to be expected as it has been primarily circulated within the association community. Another 12% of respondents are for-profit companies across a span of industries. The remaining 8% of respondents include philanthropic organizations, governmental entities, academia, a Pharmaceutical Sciences group, a Standards Development Group, a Student Organization, and a Museum.

Specialized reports that are relevant to your specific organizational type are available on request and we can also provide custom social media surveys for your users and member communities to benchmark against other organizations.

**Note:** This survey will be continued on an ongoing basis to capture long term trends in the use of Social Technologies. You are encouraged to recommend colleagues in other organizations to contribute to this body of knowledge as we measure social technology use across all sectors.

The survey link is: <http://Ez.com/SMSurvey>

## Q 2. Where are you getting information on Social Media

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Fig. 2

Organizations are pulling information on the use and application of Social Media from a very wide range of multiple sources. The vast majority of associations surveyed are looking to the American Society of Association Executives (ASAE) and LinkedIn or similar public social networks. In total there are over 60 different sources listed. This highlights the newness of the topic and the lack of case studies and examples on which to build a recognized body of knowledge and best practices.

**Note:** Most information sources and consultants focus on the technology aspects of social media, with fewer sources on how to develop a social media strategy or business plan.

ASM consultant,  
Association Forum of Chicagoland,

Blogs,  
CESSE,

CSAE  
Digital Now Conference,

eweek,	iStrategy Labs	ReadWriteWeb.com,
Facebook	IT staff,	SIGCHI,
Folio,	IxDA,	Smart Brief for Social Networks,
Forums and blogs,	Meetup.com,	Social Fish
GLOBALSTRAT	MemberFuse,	SusQTech,
Higher Logic	Members,	Tech Republic
Groundswell	Microsoft,	CNet
Here Comes Everybody,	National Association of Realtors,	The Port,
Higher Logic,	National Council for Marketing and	Twitter
IAEE,	Public Relations,	UPA,
Interactions magazine,	NTEN website,	Websites: <a href="http://web-strategist.com">http://web-strategist.com</a>
Internet,	Other knowledgeable people,	<a href="http://www.mashable.com">http://www.mashable.com</a>
introNetworks,	Peers,	WOMMA

### Q 3. What is your current Social Technology status

How would you best describe your organization's current status regarding Social Technologies?

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The vast majority of organizations are in the stage of evaluating different social technology platforms while many have started testing some social media implementations, usually on Facebook or on LinkedIn. Many organizations lack a plan, have difficulty understanding how to measure results and are trying to drive greater engagement.

These results indicate that we are still just at the very beginning of the maturity cycle and that most organizations are struggling with how and where to get started in a meaningful way. The lack of a methodology to measure effectiveness will remain a barrier until clear metrics are implemented.

It is our strong recommendation that organizations should use public based social networks, such as LinkedIn and Facebook, as a means to raise awareness for your organization but that a private social network (member only community) is the most appropriate model to deliver real value added services and to maintain control over your brand message.

(See Social Strategy White Paper for pro's and con's of public versus private social networks)

## Q 4. Technology Tools Usage

Please rank the status of each item for your organization, as it applies at this time.

**Error! Not a valid link.**Fig. 4

Email distribution lists are by far the most commonly used electronic means of communications employed by organizations, followed by discussion forums and Listserves. Webinars are also widely used and their use is planned to meet or exceed that of the discussion forum / Listserver tools. Notably, Listserves are the one tool being dropped more frequently than any other.

Although with penetration rates of less than 20% for a period of one year or more, Wiki's, Social Media Sites (internal and external), and Blogs are all slated for significant growth over the next 12 months. As email overload reduces the effectiveness of that tool, organizations will need to "pull" rather than "push" their messages through active engagement.

## Q 5. Sources of Revenue

How do you plan to obtain, or are currently obtaining revenue from your online activities (includes website, webinars, social networks and other electronic or Internet based presence.)

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Fig. 5

Despite the fact that it is now commonly accepted that Banner Advertising is relatively ineffective\*, it remains the primary source of income related to online activities. Advertisements that are integrated in email messaging is beginning to emerge as a new ad platform. This is one area where your members facilitate distribution and is a promising source of future revenue. The fact that social media sites are drawing people away from static websites and that advertising on social sites is not well tolerated, organizations will need to rethink the revenue models for their online presence.

User generated content and the development of valuable Intellectual Property is key to developing new sources of revenue.

\*IDC, the technology research firm, published a study that reported that just 3 percent of Internet users in the United States would willingly let publishers use their friends for advertising. The report described social advertising as "stillborn."

## Q 6. Social Networking Platforms Awareness

Please indicate your, or your organization's, awareness of the following Social Networking Platforms. Please list any others you are aware of and the degree of awareness or use.

**Error! Not a valid link.**

Fig. 6

Facebook and LinkedIn are by far the most commonly used platforms for social networking sites, followed by SharePoint, Yahoo!, Google and Plaxo. Additional sites submitted by respondents included Xing, Leverage Software, CollectiveX, and MemberFuse.

We expect that as organizations grow their online communities and recognize some of the limitations of public sites such as Facebook and LinkedIn, there will be a trend to migrate towards private networks that are integrated with an organization's AMS (Association Database Management system) or CRM (Customer Relationship Management system) in order to provide tailored services for members and to regain some control over organizational branding and data.

At the same time, public sites are increasing their services and functionality to meet the growing needs of online communities, creating potential competition to associations.

## **Q7. Who's responsible for Social Networking**

Please identify the appropriate primary responsibility for each department listed regarding Social Networking programs.

**Error! Not a valid link.** Fig. 7

Project ownership for Social Media in an organization varies widely with the highest percentage being vested with Communications, Marketing or directly with the CEO, if at all. Management of the actual content is the responsibility of Communications, Member Services, Publications, Education Events or the Chief Marketing Officer. Content Contribution comes from across the organization with the least amount of content provided from the CIO.

The choice of IT solutions, however, were most often the responsibility of the CIO or to a lesser degree, the CEO or COO. Design decisions seemed to not be assigned to anyone in most cases. This is a critical gap as community platform design is critical to the user experience.

For smaller organizations that do not have multiple departments, individuals are assuming multiple roles and responsibilities in this area. When planning for social media, we strongly encourage getting all departments involved.

## Q 8. Who are your Social Networking "champions"

Who are the greatest "champions" for the use of social technologies within your organization?

Who on Staff? Who from the volunteers / members?

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Fig. 8

Most organizations have multiple "Champions" for social media with the staff positions of CEO, Communications Director, Marketing Director and Membership Director leading the charge. Volunteers are also highly involved, representing many levels within an organization including Board Chair, Board Member, Committee Member and "Members at Large" advocating for social networks.

Because of the pervasive nature of social media and its newness for many organizations, it is important to raise awareness and understanding throughout the organization on how social media can be used in a positive and professional manner.

## Q 9. Social Networking Budget

Does your organization have a dedicated budget for Social Networking programs? In which department or category is it placed?

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Fig. 9

Because the social networking phenomenon is so new, the overwhelming majority of organizations do not have a dedicated budget for these activities. Less than 10% have a budget specifically for social media activities while others that do have a budget allocation, wrap social media within IT, Communications, Marketing or Membership. 65% of organizations that responded have no budget allocation anywhere within the organization for social media activities at all. Combine these facts with the lack of clear accountability for social media and you have a recipe for failure.

Our view is that associations need to allocate dedicated investments in this tool and that it will require not just a specific budget, but that organizations will also need to rethink their staff structures to support a more fluid and interactive engagement with the community members on a higher contextual level than in the past. There will be a new role for a "community manager" that includes excellent communications and personal relationship skills.

## **Q 10. Will Social Networking be the primary method of communication?**

Please mark the answer that most closely matches your view: "I can see that social network marketing and communication will be the primary method of communication for our organization, its members and its stakeholders within the next '?' years."

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Fig. 10

It is quite a statement to claim that "social network marketing and communication will be the primary method of communication for our organization, its members and its stakeholders" at some point in the future. However, the pace of change is relentless and the adoption of these new methods of communicating, collaborating and associating has certainly reached a critical mass.

The question is not really "if" but "when"? The majority prognosis is for widespread adoption within 3-5 years. That means that organizations that start now will have the clear advantage when others are playing "catch-up". Mistakes will be made and lessons will be learned but that is how organizations and people grow and develop.

These are exciting times and Social Media promises to unlock tremendous human potential. Do you have a plan for this new environment?

## **Your Organization – Next Steps...**

Associations and companies are so diverse and operate under conditions and in environments that are so significantly different from one another that it is impossible to suggest a "one-size fits all" solution. However, the development of a sound strategy for your organization should follow a proven process driven approach. A Professional Grade Social Media Strategy should address key elements:

- Your objectives
- Your audience (current and potential)
- Your message
- Your Intellectual Property (IP) strategy
- Your network champions
- Your platform(s)

- Measurement
- The process, structure, plan and resource allocation to implement your strategy

GLOBLSTRAT specializes in developing growth strategies for organizations, including the use and application of social technologies and developing new client markets.

Feel free to use this report in your organization, together with the “Successful Social Network Strategies” white paper as reference documents that stimulate meaningful discussion, guiding both staff and senior leaders to ask the right questions.

Sooner or later, your Board of Directors is going to ask two key questions: “What is our social media strategy?” and “Is it working?” We can help you prepare to answer these inevitable questions. Give me a call if you would like to learn more. I look forward to hearing from you at +1 202 294 5563.



Terrance Barkan CAE  
Chief Strategist & Business Architect  
SOCIALSTRAT

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***“There are those that make things happen; those that watch things happen;  
and then there are those that ask... “What happened?”***

## **About the Author & SOCIALSTRAT**



**Terrance Barkan CAE,  
Founder, Chief Strategist & Business Architect  
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Terrance Barkan CAE has been a senior international association manager for nearly 20 years. He has served as the Executive Director and senior advisor for international trade and professional societies worldwide.

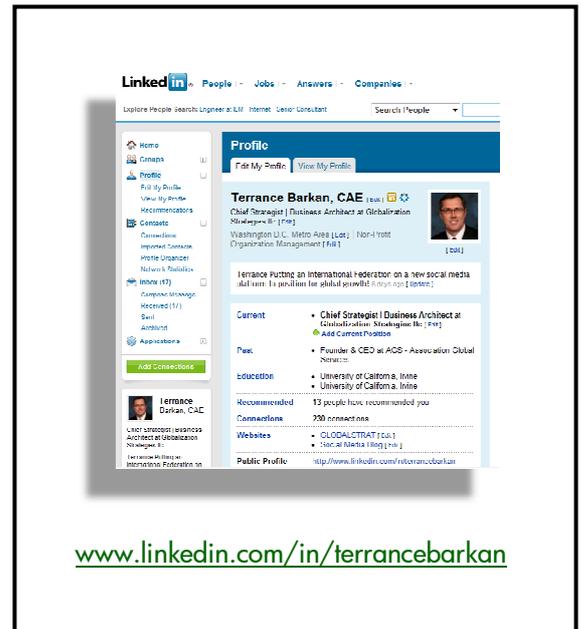
Mr. Barkan founded SOCIALSTRAT when he identified the need for a specialized consulting practice that uses a solid, process management approach to developing strategies for social

media. He recognized that all associations and businesses need to have a social media strategy but that most social media “experts” focus on tools and features, missing the bigger organizational impacts.

The new company provides vendor independent expert advice for organizations to develop a professional social media strategy geared for growth and member/customer engagement. This includes how to build internal staff capacity and capabilities to manage social media in an environment where the tools and applications change faster than the strategy itself.

Mr. Barkan has been recognized as a Global Thought Leader on association management, and is the author of numerous articles, white papers, blogs and webinars on how to develop social media strategies. His firm provides online training, social media workshops and custom consulting for clients. He has worked with trade and professional societies, federations and for-profit companies.

Mr. Barkan brings an entrepreneurial approach to growing clients with a specialization on developing new intellectual property, content and growth through the use and leveraging of online communities.



## About SOCIALSTRAT

SOCIALSTRAT was born out of the recognition organizations often struggle with generating growth and member/client retention. For many, international expansion is their most promising path to growth but there are questions:

- What is the right business model?
- How do we measure the potential for sustainable growth in new markets?
- How do we build our internal capacity to manage international programs?
- What is the right governance structure and what are the implications?
- What are the mistakes that others have made that we need to avoid?

At the same time, Social Technologies are forcing organizations to re-examine their structures, governance, membership offerings, communication strategies, IT platforms, Intellectual Property strategies, product and service delivery platforms, and a host of related issues.

The implications of new Social Technologies are often addressed only from an IT or marketing perspective, but there is precious little information or guidance for senior management on how to design and develop a professional grade Social Network Strategy.

SOCIALSTRAT helps organizations to grow by developing well thought-out strategic business plans, teaching organizations how to use and leverage emerging "Social Technologies".

We apply our collective experience, knowledge, skill, judgment, creativity, intellect and collaborative approach to solve complex client problems. SOCIALSTRAT provides the kind of advice organizations need to succeed today and to grow tomorrow.

Want to learn more? Contact us for more information.

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If you have a question and just want to learn more, give us a call.

I look forward to hearing from you.