Public Relations Society of America 2011 International Conference
Presentation Outline
“Financial Fitness: Engaging Gen Y in a Conversation About Money”
Presented by
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Monday, Oct. 17, 2011, 9:45-11 a.m.

What Motivated Schwab’s First Foray into Social Media

1) Context and Background
   a. How social media had already transformed the PR/communications
      function at many firms.
   b. Where Schwab was in terms of adopting social media.
   c. Overview of FINRA regulations related to social media for financial
      services firms.
   d. Brief background on Schwab Community Services.

Why We Created the Money Mondays Social Media Campaign

2) Background on the impact of the economic downturn on Gen Y
3) Focus group and research findings from Charles Schwab and Pew Research
   Center
4) The solution: an educational campaign intended to help young adults facing
   “financial firsts” as they graduate, start working and begin living on their own

Campaign Elements and Execution

5) Money Mondays’ Overview and Campaign Components
   a. Website content
   b. Role of Facebook & Twitter
      i. Creating a “voice” for the campaign
      ii. Launch strategies
      iii. Differentiating from other Schwab social media channels
c. Contests

d. Partnerships and content curation

Campaign Metrics

- Twitter followers
- Twitter engagement and Retweets (reach)
- Facebook metrics
- Contest engagement
- Website traffic
- Media coverage
- Increased engagement by Schwab internal business partners

Ten Lessons Learned from Money Mondays

An overview of 10 key things we learned that will influence our own future campaigns, and those of the audience

Questions about Joining the Conversation

Q&A with Attendees