

The Challenge Convention: Thought-Leadership Conversations to Strengthen Brand

charles
SCHWAB



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The Challenge Convention: Background

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- Semi-Annual event located at Schwab campus
- Guest speakers on important topics
 - Climate change
 - Workplace equality
 - Environmental sustainability
 - Volunteerism,...

The Challenge Convention: Opportunities

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- Increase employee engagement
- Establish Schwab as a bold thought-leader for “business-solutions-to-social-problems”
- Outreach to leaders of bold movements
- Outreach to local civic and business leaders

The Challenge Convention: Recommendations

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- Rebrand “The Challenge Convention”
 - Maybe...“SCHWAB_x”
 - Still Schwab, but connotes something extra
 - Make subconscious connection with **TED_x** (similar convention of scintillating topics)
 - Or...“SCHWAB_{TV}”
- Build a video library of bold conversations
 - Incorporate into Marketing collateral

The Challenge Convention: Recommendations

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- Incremental polish to increase “production value”
 - Multi-cam show: Wide, tight, audience + Q&A
 - Lower-third graphics: Remind us who we’re listening to & why
 - Also, can promote their cause (or book, website,...)
- Curtain the walkway at the back of “the house” (211 Main St.)
 - Create atmosphere of exclusivity
 - Also, protects stage presenters from late-arriving attendees
- Add video monitors to audience wings
 - Helps visibility of program to those in oblique viewing angles to stage and projection screens



The Challenge Convention: Recommendations

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- Increase employee engagement
 - Survey employees on the types of topics that interest them
 - Make the “in-house” theater experience more compelling than the remote “workstation” experience
- Allow Account Executives to network with the business and civic attendees

The Challenge Convention: Recommendations

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- Outreach to local business and civic leaders
 - Invite Bay Area Chambers of Commerce (and their members)
 - Invite local civic governments (and their constituents)
 - Respond to RSVPs
 - Info gathered as Marketing opportunities
 - Map/directions (see Appendix 1)
 - Follow-up surveys

The Challenge Convention: Recommendations

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- Establish reputation as a platform for thought-provoking conversations
- Seek out speakers on the “thought-provoking conversation” circuit
- Build library of content
 - Add video library to Marketing Strategy



Kyiakhalid
RUIZ, MBA

- 15-year Marketing, Communications & Brand Management
- MBA (2015)
 - *Social Entrepreneurship*
- Pursuing a career position helping an established brand

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The Challenge Convention: Appendix 1: E-mail Confirmation, Map & Badge Labels

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SCHWABX Challenge

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Sept. 24, 2017
211 Main St., SF, CA

8:30: Check-in, 9am: Presentation, 10:30-11: Networking

Thanks for your interest in the SCHWABX
Challenge!

Please tell us a little about yourself:

Name:

Title:

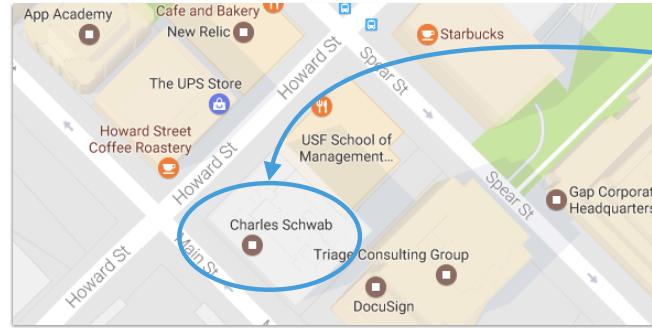
Business:

Suggestions:

We can't wait to meet you!

Click [here](#) to add this event to your calendar

Click [here](#) for directions



Map to 211 Main St., SF, CA
(so that people don't
accidentally get sent to 200
California St. like I did)



Color-coded badges for networking:

Green = business/civic leaders, **Blue** = Schwab employees

 Sample email RSVP confirmation