

Schwab Leadership Team Event Naming

Goal

To create a name for a new Schwab event which focuses on deepening the relationship between Schwab's leadership team and regional Registered Independent Advisors.

Business Objective

“X” is a chance for forward-thinking RIAs to learn what Schwab is doing to help promote their personal development and drive their business forward. The interactive format will create plenty of opportunities for conversations with the leadership team and peer Advisors in their region. We want attendees to walk away understanding that we can give them the kind of resources and support that can help them lead the industry.

Target Audience

The next generation of RIAs. They may be younger, new to their firms or to the industry, or established RIAs who recognize that as client demographics change, their firm needs to change as well.

Naming Criteria

The name should be easy to say, relatively short, convey the meaning of the event, and make a family with the other Schwab event names. Since we're addressing a younger crowd, it might be nice to have a hip factor. The keywords we want to test the names against are:

- Leadership
- Interactive Format
- Personal Growth
- Optimism
- Active Verb
- Hip Factor

We started with more literal names, following the style of INVESTMENT OUTLOOK and SOLUTIONS, then went to more active, inspirational names in the style of EXPLORE and IMPACT.

LEADERS' FORUM

Literal, flattering to all, sounds official

- ✓ Leadership
- ✓ Interactive Event
- ✓ Personal Growth
- ✓ Optimism
- Active Verb
- Hip Factor

EXCHANGE

High-level financial business center; personal exchange of ideas, skills, and value

- ✓ Leadership
- ✓ Interactive Event
- ✓ Personal Growth
- Optimism
- ✓ Active Verb
- Hip Factor

STRIVE

Ambition, call to action, sounds authoritative
yet smooth, a challenge

- ✓ Leadership
- Interactive Event
- ✓ Personal Growth
- ✓ Optimism
- ✓ Active Verb
- ✓ Hip Factor

GAIN

Advance, Gain knowledge, experience, skills
and partners, strong and simple

- Leadership
- Interactive Event
- ✓ Personal Growth
- ✓ Optimism
- ✓ Active Verb
- ✓ Hip Factor

IGNITE

Invitation to get fired up and start things; hot topics, powerful

- ✓ Leadership
- ✓ Interactive Event
- ✓ Personal Growth
- ✓ Optimism
- ✓ Active Verb
- ✓ Hip Factor

ACHIEVE

What this event will help you do, a challenge and a promise

- ✓ Leadership
Interactive Event
- ✓ Personal Growth
- ✓ Optimism
- ✓ Active Verb
Hip Factor