




Have questions? Use the chat panel –  we'll field them as we go and during the Q&A recap at the end of the call.



A Harland Clarke
Speaker Series

Social Media Strategy Story + Unexpected Discoveries

March 29, 2018

The content for this presentation was created by Holly Fearing. The views and opinions expressed herein are those of the author, Holly Fearing, and do not necessarily reflect those of Harland Clarke.

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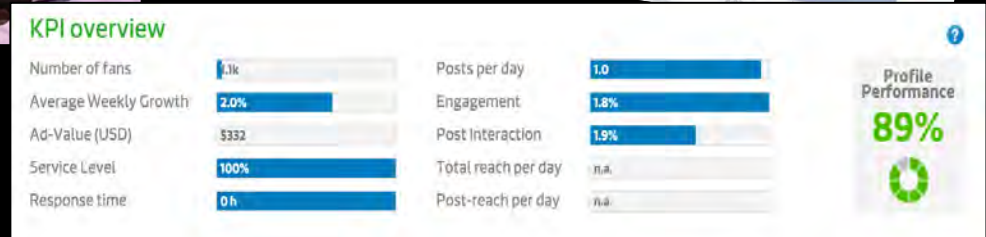
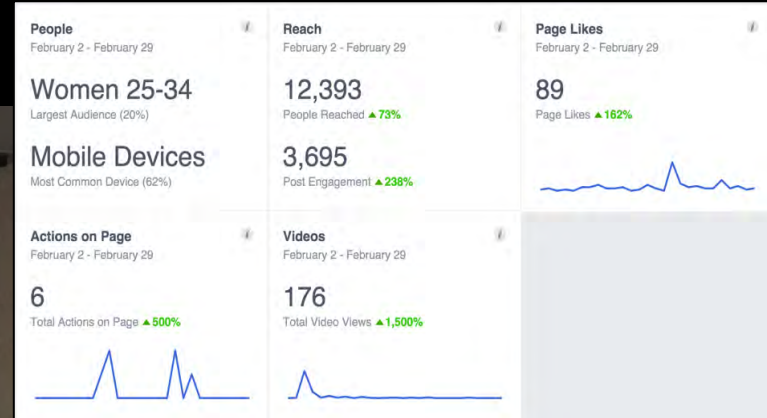


Moderator

Christine Ahlgren

Harland Clarke

TAKING OUR OWN MEDICINE...





FILENE CASE STUDY

STRATEGIC OBJECTIVES

- Make more people **aware of Filene / our work.**
- Encourage more organizations to **participate in Filene opportunities/events.**
- Drive more organizations to **engage in Filene's programs** which will transform consumer finance for the better.
- **Support all efforts of the organization** to accomplish goals in smart and strategically-designed approaches.
- Elevate **Filene's expertise in social media strategy and execution**



FILENE CASE STUDY

STRATEGIC OUTCOMES

- **More frequent** posting on social media
- **Better execution** on existing / new platforms
- More **original content** created
- **Showcase genuine Filene brand:**
resounding expertise,
playful curiosity, precise creativity





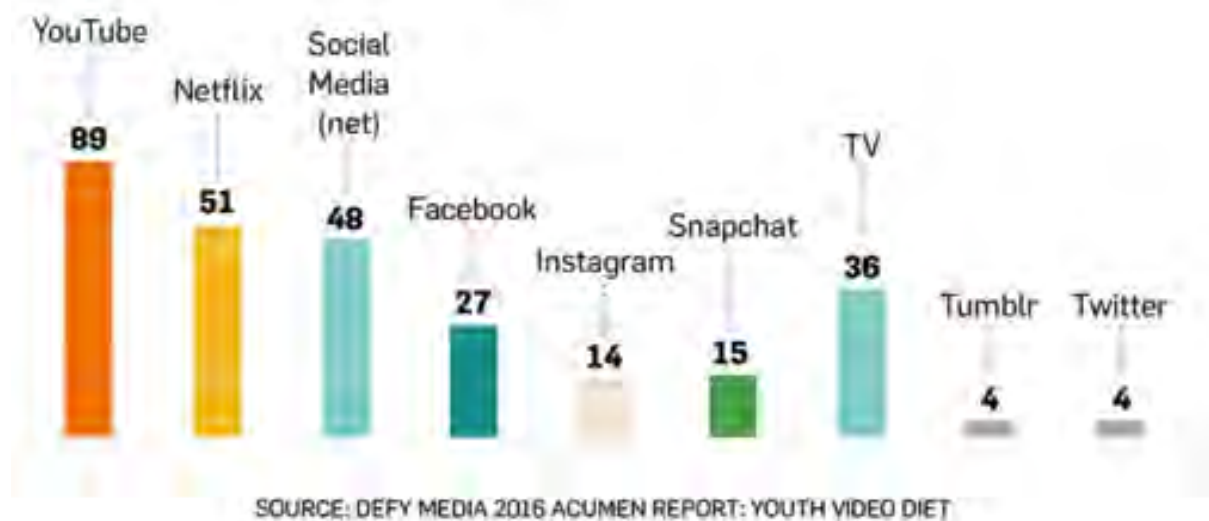
5 DIGITAL COMMUNICATION TRENDS:

1. **Employee advocacy/influencer programs** – builds huge trust among personal networks
2. **Brands using internal social networks & social messaging apps** – All about collaboration, convenience, personalization (Ex; Slack, WhatsApp, Snapchat)
3. **Financial Services through social** – P2P funding, accessing accounts through Facebook, crowdsourcing ideas/services
4. **Video is the new photo** – live streaming becoming mainstream
5. **Humanness still reigns supreme** – nothing beats real, authentic and genuine; listen to what the audience wants and simply deliver.
Pro Tip: Use the data you have from your audience to better serve their needs

TRENDS: THE POWER OF VIDEO

- "Most of the content 10 years ago was text, and then photos, and now it's quickly becoming videos," said Mark Zuckerberg, justifying Facebook's aggressive push into the area. "I just think that we're going to be in a world a few years from now where the vast majority of the content that people consume online will be video."

The Video Sites Millennials Can't Live Without



VIDEO EXAMPLES

- How-to videos: How to Get Pre-Approved for a Mortgage (*Seekers of “How-To” education is one of the biggest uses of YouTube*)
- Mission/Values driven videos: Some Choices Matter
- Entertainment /‘Viral-factor’ videos: Save the Bros (Organic Valley cooperative)
- Education: It’s a Money Thing



NEW & EMERGING AUDIENCES

- Members / Customers / Communities
- **Staff as Brand Ambassadors**
- **Media / Journalists / Influencers**



IN-PRACTICE TIPS:

First step to becoming a personal brand ambassador is...

Profile Clean up:

- **Keywords / Bio**
- **Photos**
- **Links**
- **Connections**



IN-PRACTICE TIPS:

- **Start talking with your network** of friends, family, neighbors, communities, and groups on **Facebook**
- **Move on to Twitter**— Share financial content and stories about your organization.
- **Connect and discuss with others on LinkedIn** – *Find and join specific networking groups, learn, share, grow*



STAFF AS AMBASSADORS

IN-PRACTICE TIPS:

- Use Images / Videos
- Show Behind-the-Scenes
- Create/Share How-to articles & videos
- Blog about your passion for what you do (use LinkedIn)
- Be a thought leader and financial expert for everyone in your digital (and non-digital) networks.



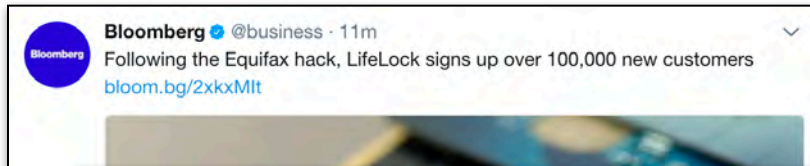
REACHING NEW AUDIENCES: MEDIA

Journalists love twitter!

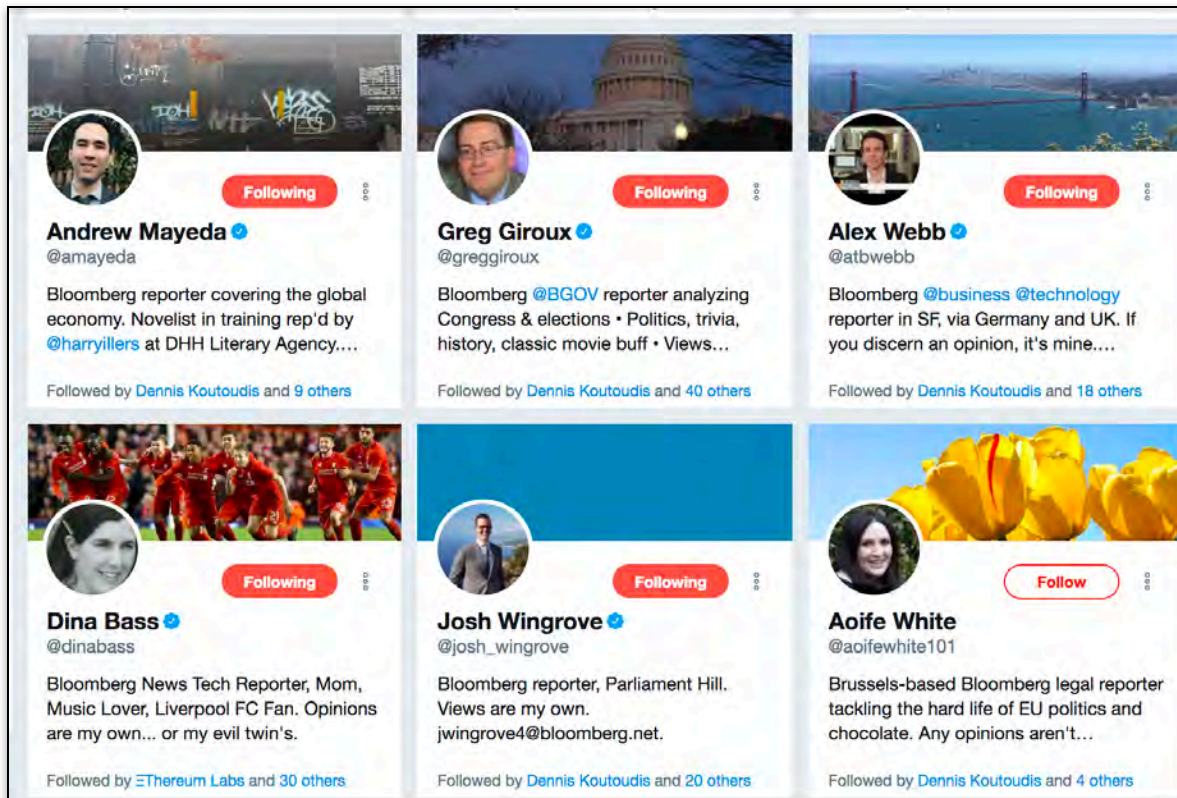
→ 88% say they find sources from the platform



REACHING NEW AUDIENCES: MEDIA



REACHING NEW AUDIENCES: MEDIA



BEST PRACTICES FOR MEDIA CONNECTION:


- **Search on Twitter for Journalists**, bloggers and freelance writers who cover consumer finance topics, especially media in your community: Connect and introduce
- **Offer, offer, offer**: Don't ask for anything in return – offer to provide content, expertise, access to financial leaders, commentary from your subject matter experts for their upcoming stories.
- **Build relationships**: Share their stories, tag their profiles and organizations.

NEW CHANNELS TO EXPLORE

- Blog
- Podcast
- New social tools, streaming
- E-Marketing automation tools



This is a Bomb Diggity Big Darn Deal!

By Mark Meyer, CEO on February 22, 2016

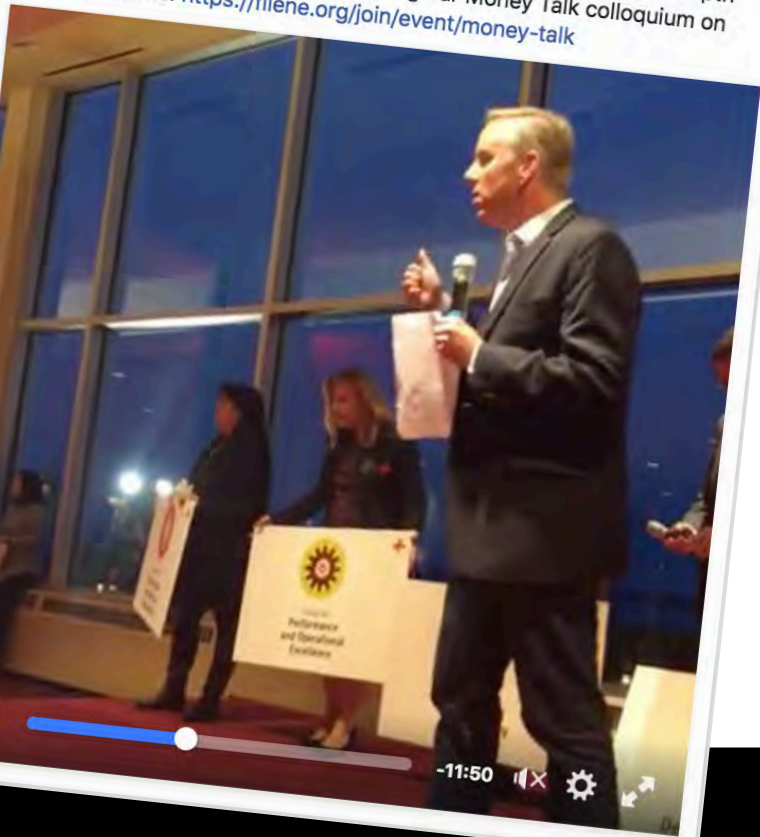
Filene  Centers of Excellence




With a lump in my throat and a skip in my step, I enthusiastically share the news that Filene is launching five *Centers of Excellence* to explore emerging topics critical to the future of consumer finance. This focused approach excites us to no end, because it's the credit union movement and the millions and millions of credit union members around the world that will see the biggest value from this effort.

The credit union system of the future will not look the same. And credit unions in that future need the kind of research, analysis, and insights that come from Filene's Centers of Excellence.

 **Filene Research Institute** was live.
Published by Holly Jean Fearing [?] · 7 hrs · 

We're live at our Annual Meeting. This impact is possible only because our members make it so. The gratitude we have for you is huge. This year has been a year of great focus and one such is to encourage our members to dive deeper into our research than ever before. We have many in-depth opportunities for just that, next up being our Money Talk colloquium on Nov. 18. Join us: <https://filene.org/join/event/money-talk>



-11:50   

#1 TRAFFIC DRIVER: BLOG

FILENE: THE BLOG

Aloha! Tansley Stearns Sets Sail in Support of Credit Unions

14

By Mark Meyer, CEO on March 12, 2018



The Oxford English Dictionary defines the word Aloha as a greeting to mean both "welcome" and "farewell." This is why the word is a perfect fit for what the Filene team will be saying to Tansley Stearns, our chief impact officer, later this month.

ARCHIVE

2018
March
February
January
2017
2016
2015
2014
2013
2012
2011

SEARCH

Search by Keyword

BY CATEGORY

Select a Category

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Select an Author


BENEFITS OF BLOG + SOCIAL MEDIA


- Drive traffic to website
- Reach new audiences (through search engine hits)
- Establish expertise on topic(s)
- Convert readers to members; deepen member engagement
- Enhance member trust / financial




EXPERTISE & PERSONALITY: PODCAST


Spotlight (5/5) Edit Spotlight


 **Filene Research Institute**
Filene Fill-In Ep. 35: Speaking of Change 1 month # Business




 54:25

 Write a comment

 Like  Share  More ▶ 196

 **Filene Research Institute**
Filene Fill-In Ep. 34: RegTech & Credit Unions--Trench Stories, Love & Aspiration 2 months # Business


 55:57

 Like  Share  More ▶ 206 ⬇ 3

Followers **41** Following **61** Tracks **36**


Nonprofit, independent think and do tank for the consumer finance industry. Examining the future of credit unions, retail banking and cooperative finance.


filene.org/

 Stats View all

Plays last 24 hours **10** Plays last 7 days **34**

6,420 plays in total

 2 likes View all

 National Credit Union Foundation
#2 - Nanci Wilson's Seeds-2-Save & ... ▶ 285 ♥ 3

BENEFITS OF PODCAST + SOCIAL MEDIA

- Awareness, authority, expertise
- Enhance trust and increase financial literacy authority
- Capture new audiences: weekend listeners and commuters
- Channel is less crowded than blogs in financial sector
- Yet, growing trend increasing in popularity
- Stickier engagement – listeners stay on longer than a video
(*22 min. is average podcast length*)

STATE OF SOCIAL FOR FIN SERVICES

“Investing in a social strategy now is the single best way to future-proof your business for the years ahead.”

- Hootsuite CEO Ryan Holmes

Challenge:	Solution:
Regulations and Compliance	Social Media Policy & Audit plan
Ownership and Execution	Education, Advisory Support: Assessment and Definitions
Resource / Staffing Concerns	Strategy and Content Plan
Maintenance / Changing Environment	Org-wide Buy-In / Support; Outside Expertise and Education



OPPORTUNITIES AHEAD

- Further legitimizing your digital capabilities as a business
- Prepare to not be left behind the FinTech tide
- The “new way of doing finance” is in the hands of consumers:
Gone are the days of businesses deciding what people want – by staying close to the trends you can be first to be relevant and useful...and profitable

Q&A Wrap Up

Type your question in the chat panel 

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Presentation materials and video replay will be provided within one week.

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Thank You.

