



**SUCCESSFUL CROSS-PLATFORM  
AUDIENCE CAMPAIGNS  
#POWEROFPR**

**MARISSA PICK  
DIRECTOR OF SOCIAL MEDIA  
@MARISSAPICK**



**CFA Institute**



# FACTS AND STATS

madness, it is  
not love.

Calderon de la  
Barca

Je willen is je  
witten. Het wat  
witten op het eerste  
gezicht.

Willem Jan Otten

Liefde kun je  
certain verbergen  
als heest.

Erasmus

Love is only a  
dirty trick played  
on us to achieve  
continuation of  
the species.

Somerset Maugham

bravarian cannot  
be held responsible  
for people falling  
in love.

Albert Einstein

Liefde is:  
als zij dood gaat  
verloft u verder.

Samuel Beckett

If love is the  
answer, should you  
please propose the  
question?

Willy Brandt

liefde is als een  
(Optogram:  
geef me de oplossins  
erbij en ik snap er nog  
niets van.

Theo van Gogh

Liefde ontstaat in het  
hart en ontspringt in  
het knis.

O. van Keulen

sex without  
empty and mean  
experience, is  
if I one of the  
woody Allen

hoetste  
as the  
end.

Socrates

Toen de liefde ver te  
zoeken was ging ik  
op reis.

Loesje

Romantic love is  
sense of self-  
delusion.

YOUR BRAIN PROCESSES  
IMAGES 60,000 TIMES  
QUICKER THAN TEXT.



“

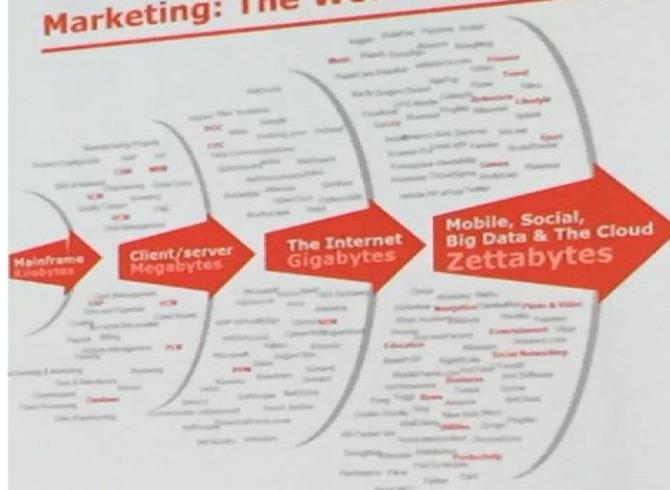
EVERY 60 SECONDS OVER

98,000

TWEETS ARE SENT!

TALK ABOUT A FAST-PACED WORLD!

## Marketing: The World Has Changed



### Every 60 seconds:

-  98,000+ tweets
-  695,000 status updates
-  11 million instant messages
-  698,445 Google searches
-  168 million+ emails sent
-  1,820TB of data created
-  217 new mobile web users

### Yottabytes

A unit of information equal to one septillion (10<sup>24</sup>) or, strictly, 2<sup>80</sup> bytes.

Source: HP Vertica



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**59% OF EXECUTIVES  
WOULD RATHER  
WATCH *video*  
THAN READ TEXT**



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statistic via Forbes

Photos and images on Facebook generate **53%** more 'likes' than the average post.

***Source: HubSpot***



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• **60%** of 50-60 year olds are active on social media

• In the 65+ bracket, **43%** are using social media

• The fastest growing demographic on Twitter is the 55-64 year age bracket

• Source: Jeff Bullas



**ADAPT OR DIE.**



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# WHAT BUSINESSES MAY DO ONLINE

- 1 Respond to questions & problems
- 2 Thank & support customers online
- 3 Ask for feedback on a business idea
- 4 Share helpful or interesting content
- 5 Promote upcoming sales & events
- 6 Monitor for potential customers
- 7 Track a customer through the buying process



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## YET MUCH CONFUSION

How do I make this go viral?

Is my audience on this network?

What's the formula?

How many retweets is good?

Will people hear my message?

Who should I follow?



START WITH A SIMPLE UNDERSTANDING:

**Social Media is a Forum!!!**



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# IT'S A FORUM. SO WHAT?

Three simple rules will help you stand out:

- **Be interesting.** It's just not going to work otherwise. No matter what.
- **Be Interested.** Look around and find others who are sharing things you like. Then interact with them!

**Engagement = Key!**

- **Be experimental.** There is little cause for conservatism. Have fun, Try things!



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# AS AN OPPORTUNITY TO CONVERSE

## Reach a new audience!

- Your audience is going to tell you what they like...either explicitly or through analytics.
- Engage with other influencers on the network and build an audience.
- Members of your community may be easier to reach on social media than in person.

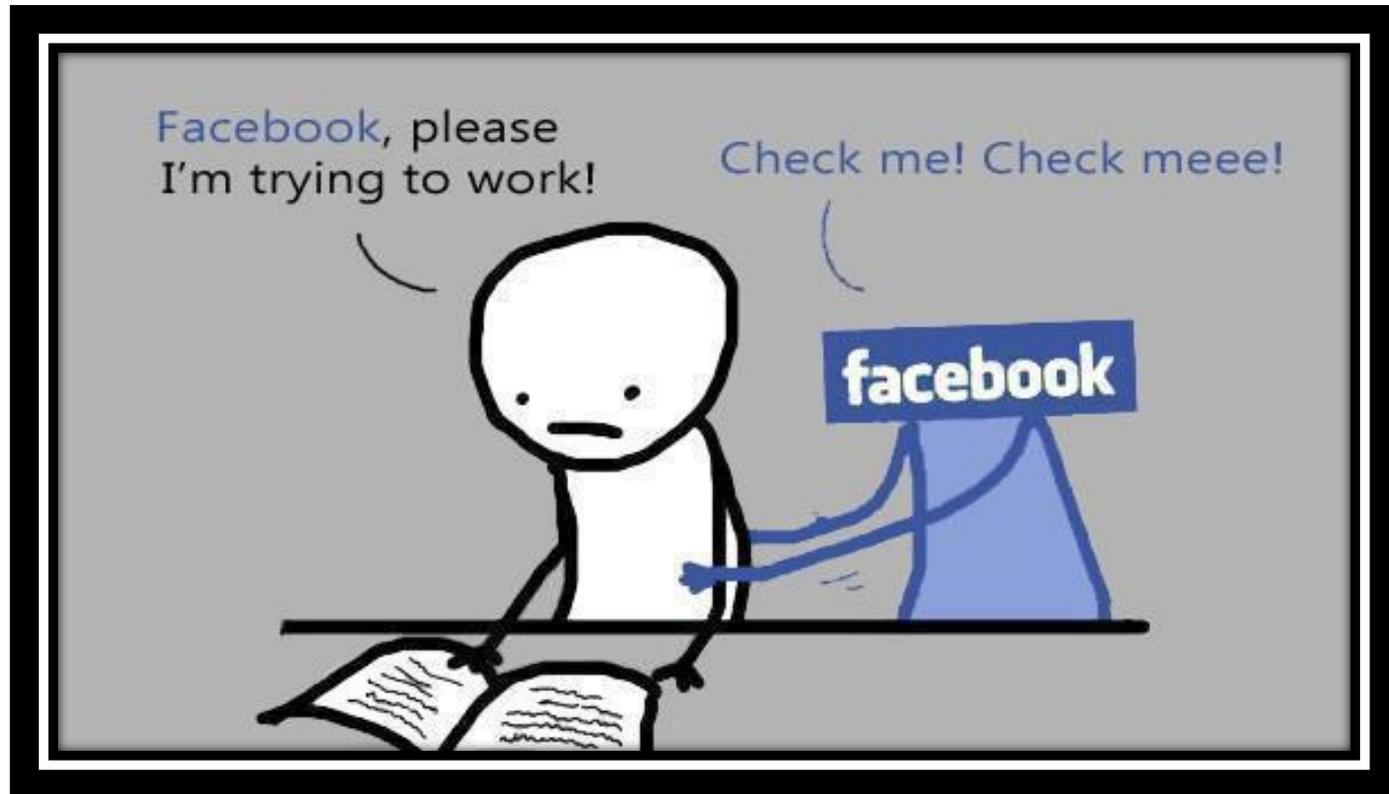


[Made by Joel](#)



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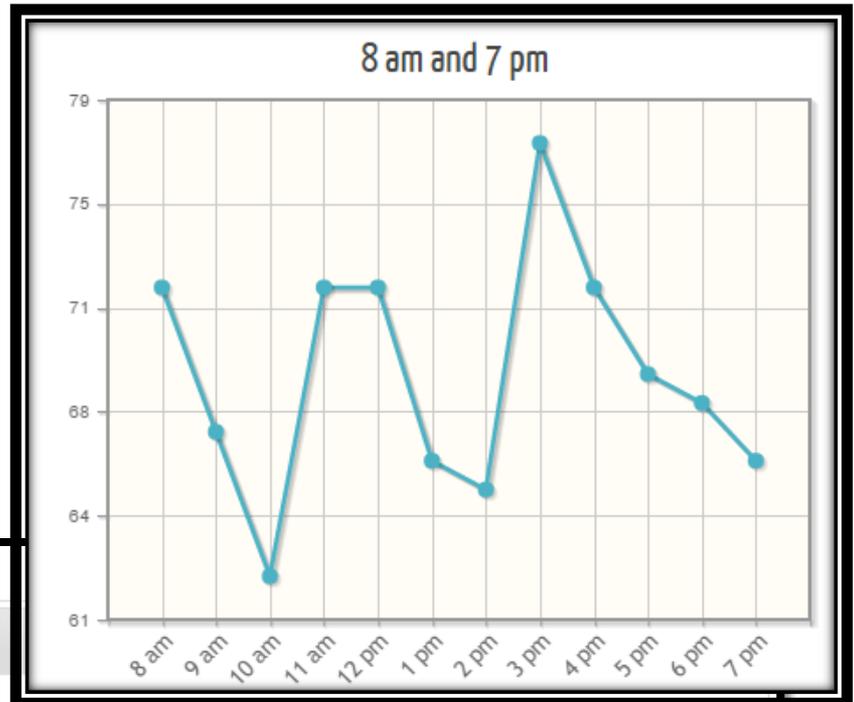
# FOUR OF MY FAVORITE TOOLS TO HELP YOU GET STARTED



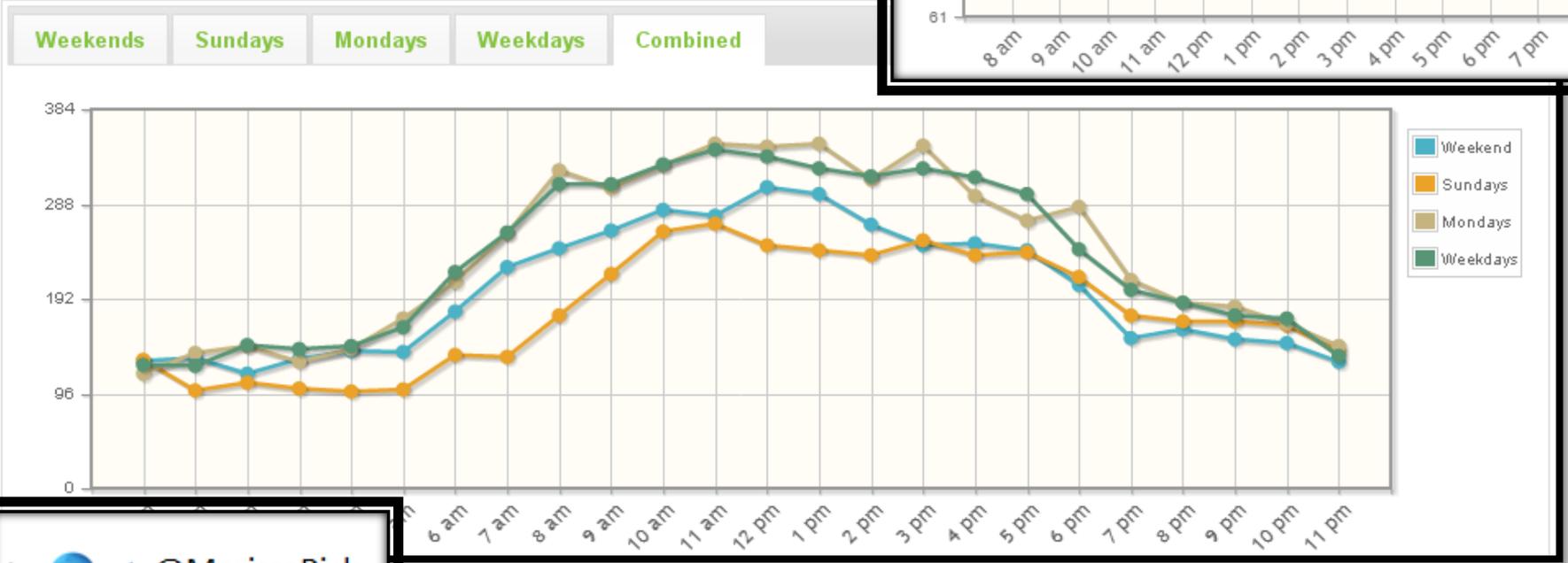
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# TWERIOD

*Start Tweeting When Other's Listen!*



Hourly graph for online followers



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# BUFFER

The screenshot shows the Buffer web interface. At the top, there are navigation links for "Business Plans", "Help", and "My Account". Below this is a main navigation bar with "Accounts", "Content", "Analytics", "Schedule", and "Settings". The "Accounts" sidebar on the left lists three accounts: "Marissa Pick Facebook", "marissapick Twitter", and "Marissa Pick LinkedIn". Below the accounts are buttons for "Connect More Profiles and Pages" and "Available on the App Store" / "Get it on Google play". The main content area shows a "Queue" with 55 items and "Suggestions" with 25 items. A search bar asks "What do you want to share?". Below that, a "Today" section displays a list of suggested content items, each with a thumbnail, title, and time. The items include: "The 10 Commandments of Good Form Design on the Web", "In Search of Meaningful", "10 Things You Must Give Up to Get Yourself Back on Track", "8 Body Language Tips for Career Success", "9 Reasons to Get More Sleep", and "Primer: #Marketing Lessons in 5 Minutes or Less".

*Install the Chrome extension!*  
Share links, pictures and videos from wherever you are on the web.

When you find something great on the web

Click the Buffer button to share now or later

Get retweets, likes and love from your friends!

**Install In Seconds**

The graphic features a central illustration of a Chrome browser window with a Buffer extension button overlaid. To the right, there are icons for a refresh button, a heart, and a thumbs-up. At the bottom, there is a prominent orange button that says "Install In Seconds".



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# PABLO BY BUFFER

## Pablo

Design engaging images for your social media posts in under 30 seconds

“Life is 10% what happens to us and 90% how we react to it.”  
– Dennis P. Kimbro

Add secondary text    Add a logo

Headline Text Options:  
Hammersmith ...    Large       Advanced

Background Options:  
 Normal     Blurred     Black & White     Increased Contrast



“Life is 10% what happens to us and 90% how we react to it.”  
– Dennis P. Kimbro

Tweet    Share on Facebook    Buffer    Download



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# CANVA

The image displays the Canva website interface. At the top, the Canva logo is on the left, and the text "File All changes saved" is on the right. Below the header is a navigation menu with icons for SEARCH, LAYOUTS, TEXT, BACKGROUND, and UPLOADS. The main content area is a grid of design templates, each with a "FREE" label. The templates include:

- social media (searched for)
- CLASS MAMMALIA
- MAMMALS
- HIKING TIPS
- AUTUMN MAGIC
- COFFEE FACTS
- ARCHITECTURE INSPIRATION
- PHOTOGRAPHY
- MOODY RIVER (highlighted in blue)
- CABIN FEVER

Overlaid on the right side of the interface is a smaller version of the Canva website, showing a search bar with "social media" entered and a grid of social media icons (Facebook, Twitter, Instagram, Pinterest) with "FREE" labels. Below the icons is a large blue square with a white Instagram logo. To the right of the Instagram logo is a small image of a Canva logo on a wooden surface. Below the image is a button that says "+ Add a new page".



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# FOUR SUCCESSFUL CFA CASE STUDIES

What people know about you  
if you're not using  
social media.



som<sup>ee</sup>cards  
user card

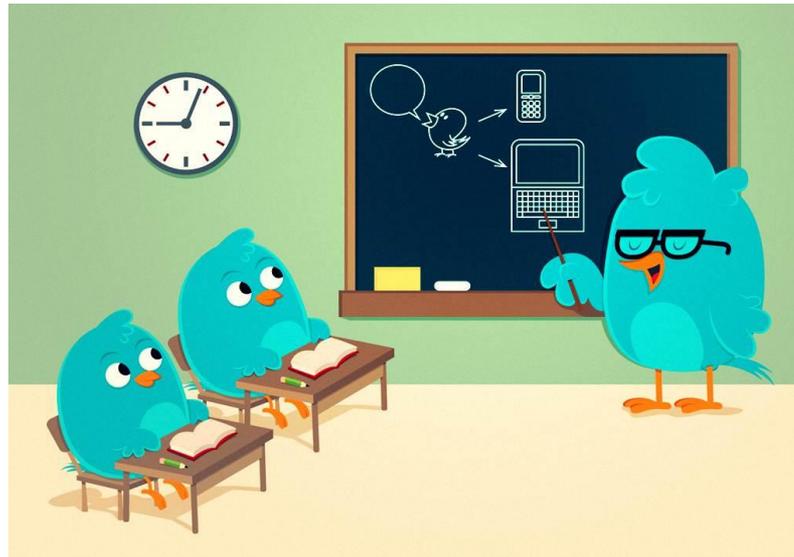


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# CASE STUDY #1- BREAK IT DOWN TO THE BASICS. SOCIAL MEDIA FOCUSED ON DRIVING ENGAGEMENT

- **Campaign Objective:**

- Drive Engagement on Social Media
- Share social media “ready to go messaging” with anyone managing social media internal accounts
- Leverage Internal Case Studies to Drive Interest in Social Media



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# SOCIAL MEDIA FOCUSED ON ENGAGEMENT



**CFA Institute**  
Published by Heda Bayron [?] · Page Liked · June 25 · Edited · [?]

700 graders from 64 countries will soon be grading an estimated 30,400 CFA Level III essay exams. Take a look at our graders in action in the mid-1960s. (Photo courtesy of Rip Payne) #ThrowbackThursday

Tag Photo Add Location Edit

Like Comment Share

1,255 people like this. Most Relevant ·

90 shares

**James C Ozigo** Please graders have mercy on me when grading the am portion  
Like Reply · 1 June 26 at 3:30am

**Tomi Rogulj** Is that the KFC Colonel?  
Like Reply · 28 June 25 at 8:06am

1 Reply

**Ian Chui** Have mercy on me  
Like Reply · 6 June 25 at 7:53am

2 Replies

**Nazanin Fahima** Wow! Can't wait for the results!  
Like Reply · 3 June 25 at 7:57am

**Akhil Agnihotri** I wish one day I will also writing those papers  
Like Reply · 1 June 25 at 10:03am · Edited



**CFA Institute**  
Published by Heda Bayron [?] · Page Liked · July 17 · Edited · [?]

A year ago today, Emiel Mahler was on board the ill-fated Malaysia Airlines Flight 17. Dutch-born Emiel worked in Melbourne and never personally received the news of passing the CFA Level III exam, which qualified him as a charterholder. In February, Hiko de Brouwer, President of CFA Society Netherlands, presented the CFA charter to Emiel's parents and brothers. Given the extraordinary effort required to pass all three CFA exams successfully, CFA Institute awarded the official CFA charter posthumously. Rest in peace Emiel.

Tag Photo Add Location Edit

Like Comment Share

3,674 people like this. Most Relevant ·

315 shares

**CFA Institute** Thank you all for your kind words and thoughtful comments.  
Like Reply · 20 Commented on by Heda Bayron [?] · July 20 at 4:37am

**Temilope George-Olaoye** Thanks to the CFA Institute for recognizing Emiel. May his soul rest in peace.  
Like Reply · 40 July 17 at 12:35pm

**Azsem Zaheer** Oooo... So admiring... great work CFA Institute..... See More  
Like Reply · 9 July 17 at 1:34pm

**Sisa Mayekiso** Congratulations to Emiel for the hard work and dedication may you Rest in peace brother. Thank you to CFA Institute for shining this candle for one of your own, feel very proud to belong to an Institution like this.  
Like Reply · 2 July 18 at 2:43am

**Jerry Li** Thanks CFA Institute and R.I.P Emiel.  
Like Reply · July 17 at 5:02pm

**Suleyman Nazarov** Rest in Peace Emiel. Great work CFA Institute  
Like Reply · July 17 at 7:00pm



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# SOCIAL CONTENT INTERNAL EMAIL

HELLO,

Below you'll find social content for you to share on various social media platforms.

We've added some attachments for those that would like to use images with their content –

Remember NOT to include “with attachment” on your social media platforms – when copying and pasting.

## #RETIREMENTSECURITY

- What does it take to create ideal #retirement systems for clients? Find out <http://cfa.is/1eZi4WY> #RetirementSecurity
- Explore the 10 principles behind an ideal #Retirement Insights system <http://cfa.is/1eZi4WY> #RetirementSecurity
- In an ideal #retirement system, clients need 60-80% of their final earnings as income <http://cfa.is/1eZi4WY> #RetirementSecurity
- Find out what an ideal #retirement system could look like with our #RetirementSecurity #Infographic <http://cfa.is/1gztWj1> #FutureFinance
- Members of @CFAInstitute's Board of Governors share their thoughts on #RetirementSecurity <http://bcove.me/tj0g11gr>

## BLOG CONTENT

- The 10 Keys to a #Retirement System That Works <http://cfa.is/1Irb6oY> @WillOrtel via @Enterprising #RetirementSecurity
- Book Review: Speculation, Trading, and Bubbles by @Princeton #economics professor José Scheinkman <http://cfa.is/1SNS39J>
- #Toshiba's \$1.2 billion #accounting scandal: Where was the #auditor? <http://cfa.is/1DM2UKv> @MattMWaldron
- #Activemanagement is suffering from self-inflicted wounds, says @TheIntuitInvest. Here are some potential remedies <http://cfa.is/1U3TinP>
- The top five posts from @Enterprising in July explore #India, #neuroeconomics tips, dark matter, & more <http://cfa.is/1P0ioAX>
- Why #Financial Advisers Need to Talk to Clients about Elder Care <http://cfa.is/1h2RAF2> via @Enterprising #FutureFinance
- One of the fastest growing segments in global finance is #IslamicFinance - Take our #IslamicFinanceQuiz: <http://bit.ly/1OC4zZg>
- Test your knowledge of #IslamicFinance. Take our Islamic Finance Quiz: <http://bit.ly/1OC4zZg> #IslamicFinanceQuiz
- #Investment adviser oversight: @IAA\_Today head says bolster SEC resources, don't outsource it to #FINRA, other SRO <http://cfa.is/1KEEb2o>
- What changes are most necessary for the #PrivateWealth industry? <http://cfa.is/1IbvOFF> (with attachment)
- #PCAOB Plan takes incremental steps to larger objective: #transparency for #investors <http://cfa.is/1IkoFDa> @MattMWaldron @PCAOB\_News
- This chart breaks #capitalism, says @WillOrtel. Can the #Fed fix it? <http://cfa.is/1ShaJdG> #InterestRates
- #Africa Rising: Now Is the Time to #Invest in the World's Fastest-Growing Continent <http://cfa.is/1IFEjfp> via @Enterprising #FutureFinance

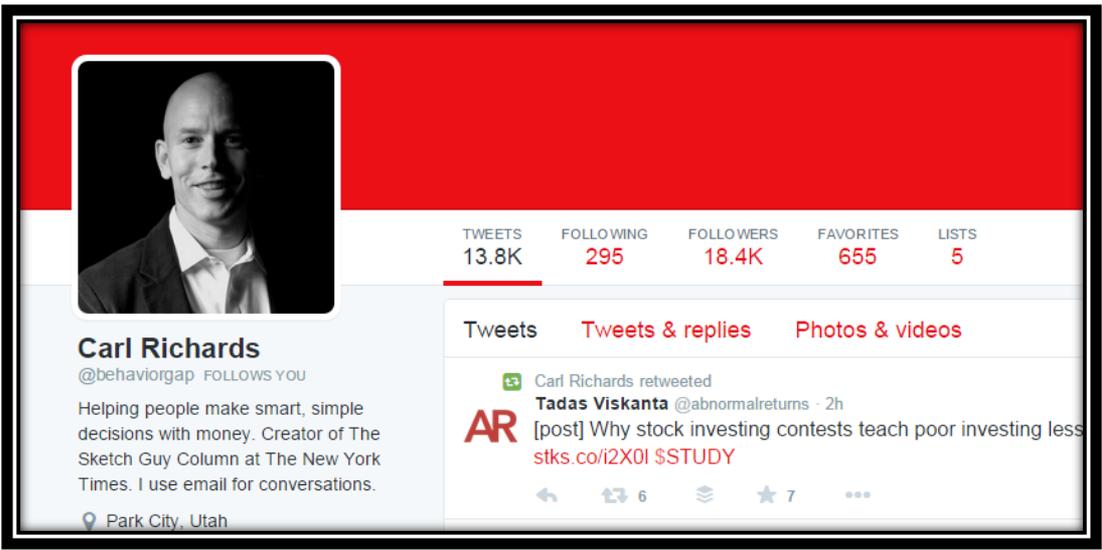
## WEBINAR/CONFERENCE

- Attend #GIPS15: The @GIPS Standards Annual Conference, 17-18 September, #SanDiego, use code TWGIPS & Save \$100 <http://cfa.is/1JcufvV> (with attachment)
- Still haven't registered for the #CFAEIC 2015 European Investment Conference? Save £50 w/ discount code TWEIC <http://cfa.is/1B04fBw> #CFAEIC
- Register now for this autumn's European Investment Conference w/ @TimHarford, @seboe, @AnneRichards16 & more <http://cfa.is/1B04fBw> #CFAEIC
- #FixedIncome Management 2015: 22-23 October, Boston. Register by 18 September & save US\$200 <http://cfa.is/1FeaMUC> #CFAFI
- Complimentary Introduction to #Ethical Decision Making Webinar: 12-1 pm EDT, 9 September 2015 <http://cfa.is/1GV3Bkt> #FutureFinance
- Can client-focused reporting add value to performance measurement? #GIPS15 speaker @ScottD\_Welch will discuss how <http://cfa.is/gips2015>
- <http://cfa.is/gips2015>: 2015 #WealthManagement Conference, 1 October <http://cfa.is/1HWTBLB> #FutureFinance #Canada



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# #CFACHAT WITH CARL RICHARDS @BEHAVIORGAP



**Carl Richards**  
@behaviorgap FOLLOWS YOU

Helping people make smart, simple decisions with money. Creator of The Sketch Guy Column at The New York Times. I use email for conversations.

📍 Park City, Utah

TWEETS 13.8K | FOLLOWING 295 | FOLLOWERS 18.4K | FAVORITES 655 | LISTS 5

Tweets | Tweets & replies | Photos & videos

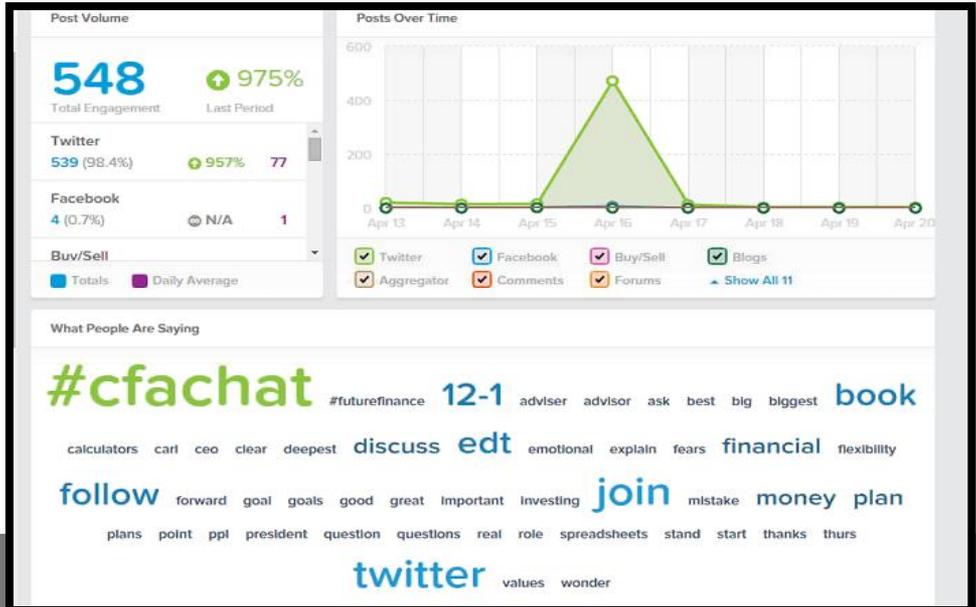
Carl Richards retweeted **Tadas Viskanta** @abnormalreturns · 2h  
[post] Why stock investing contests teach poor investing less  
[stks.co/i2X0l](http://stks.co/i2X0l) \$STUDY



**CFA Private Wealth** @CFAwealth · Apr 16  
Q3: What is the best, or most important, money question everyone should ask themselves? #CFACHAT [pic.twitter.com/mbAAPq4QB6](http://pic.twitter.com/mbAAPq4QB6)

**Carl Richards** @behaviorgap · Apr 16  
@CFAwealth #CFACHAT

**WHY**




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"What one dimension of sacrifice if eliminated would create the greatest value for your customers"

#BMA15

BMA



#CFACHAT

Q4: What are the two most important questions to ask a prospective financial adviser?



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CFA Private Wealth @CFAwealth - Apr 16

Q4: What are the two most important questions to ask a prospective financial adviser? #CFACHAT



11



5



# INSPIRE POTENTIAL CUSTOMERS EVOKE EMOTIONS

Life moves along an ever-changing road, but don't let the bumps keep you from moving forward.

#motivationnation

Show off a little now and again. You are a strong and confident person, make sure people know it.

Motivation Nation June 11, 2015

ALEX AND ANI Inspiration Of The Day!

Don't sell yourself short.

VIEW STORY

Every sadness brings a hidden gift of sweetness. Focus on better times ahead and trust the process.

Motivation Nation June 10, 2015

ALEX AND ANI Inspiration Of The Day!

Always look for a silver lining.

VIEW STORY

What motivates us is not the beauty that we expect to see, rather it is the beauty that we encounter when we're not looking.

Motivation Nation June 9, 2015

ALEX AND ANI Inspiration Of The Day!

Look around.

VIEW STORY

Listen quietly to your own voice. In times of need, it will reveal truth and peace of mind.

Motivation Nation June 8, 2015

ALEX AND ANI Inspiration Of The Day!

Your heart knows what's right for you.

VIEW STORY

@ALEXANDANI

@laurenchive loved hearing from you at @AWEConnects today. #makewaves

@CAROLYN

RT @alexandani: Love this photo of @Carolyn with the equally beautiful @meredithvieira. #ellisland @ellisland #peoplingofamerica http://

*Carolyn*

f

OFF THE WALL

share betsey watson

BE A FAN

Instagram

#CHARMEDARMS

strong decisions. If you feel it, then go with it.

Feel the wind in your hair and dance in the rain. Embrace the adventure that awaits.

Things aren't usually as they appear at first glance. Take a closer look and let the picture develop as it truly is.

Honor, trust and loyalty are some of the most integral attributes one can possess - strive for them in all that you do.

— 154 —

#MotivationNation #WithLove

33 35 ❤️ 5

Pinned by ALEX AND ANI

— 153 —

#MotivationNation #WithLove

33 67 ❤️ 8

Pinned by ALEX AND ANI

— 152 —

#MotivationNation #WithLove

33 49 ❤️ 6

Pinned by ALEX AND ANI

— 151 —

#MotivationNation #WithLove

33 30 ❤️ 6

Pinned by ALEX AND ANI

— 150 —

#MotivationNation #WithLove

33 42 ❤️ 11

Pinned by ALEX AND ANI

— 149 —

The truth is we must figure things out in our own time, but it doesn't hurt to take some advice along the way.

#MotivationNation #WithLove

— 148 —

Working collaboratively demonstrates an intelligent mind. Utilize the resources of others wisely and often.

#MotivationNation #WithLove

— 147 —

Get fancy and add some diversity to your everyday activities. Variety is the spice of life, after all.

#MotivationNation #WithLove

— 146 —

Pride yourself in being someone for whom others can turn to. Reliability is a quality to be admired.

#MotivationNation #WithLove

— 145 —

Remember that less is more and simplicity is key. Leaving something to the imagination can be quite desirable.

#MotivationNation #WithLove

## #MotivationNation

#MotivationNation #withlove

824 Pins

36,883 Followers

Unfollow board



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#PowerOfPR




**CFA Institute**   
 @CFAInstitute


Following

"Our greatest weakness lies in giving up..."  
[#quoteoftheday](#)

"Our greatest weakness lies in giving up.  
 The most certain way to succeed is always  
 to try just **one more time.**"  
 - Thomas A. Edison



RETWEETS **71**    FAVORITES **63**

2:05 PM - 4 Jul 2015


**CFA Institute**   
 @CFAInstitute


Following

"Strive not to be a success, but rather to be  
 of value." [#quoteoftheday](#)

"Strive not to be a success,  
 but rather to be of value."  
 - Albert Einstein



RETWEETS **74**    FAVORITES **45**

3:31 PM - 5 Jul 2015


 @MarissaPick  
[#PowerOfPR](#)

# CAMPAIGN RESULTS:

## 419,000 IMPRESSIONS GENERATED

## 8,210 TOTAL ENGAGEMENTS

## 1,114 RTS, 931 FAVORITES

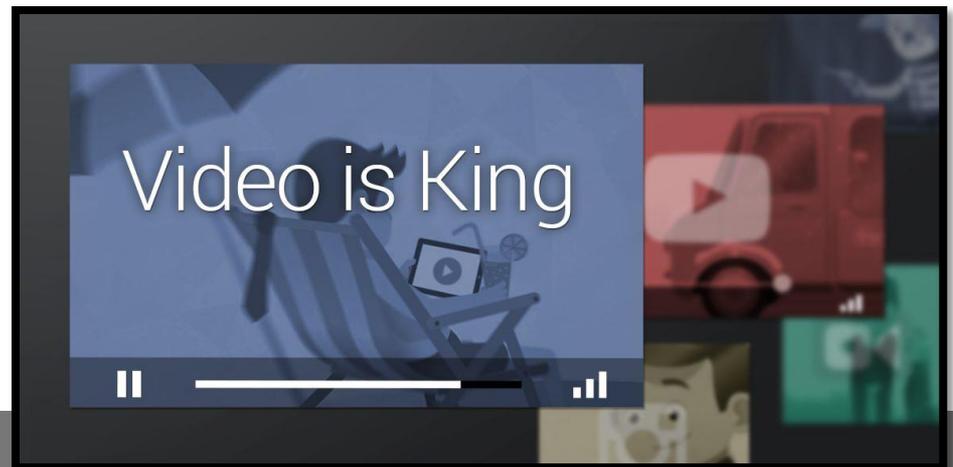
	A	B	C	D	E	F	G	H	I	J	K	L
1	#QuoteoftheDay Images Data Twitter July											
2												
3	Tweet	Date	Time	Impressions	Total Engagements	RT	Favorites	Photo/Video Clicks	Detail Expands	Link Clicks	Hashtag Clicks	Profile Clicks
4	"We are what we repeatedly do. Excellence, then, is not an act, but a habit." - Aristotle	7/1/2015	9:14 AM	14,190	258	34	35	92	54	16	12	11
5	"Courage is what it takes to stand up and speak; courage is also what it takes to sit down and listen." - Churchill	7/2/2015	1:30 PM	13,889	295	50	47	120	47	8	6	14
6	"I have been impressed with the urgency of doing. Knowing is not enough; we must apply. Being willing is not enough; we must do." - Leonardo da Vinci	7/3/2015	1:45 PM	15,389	367	54	41	175	67	12	4	13
7	"Our greatest weakness lies in giving up. The most certain way to succeed is always to try just one more time." - Thomas A. Edison	7/4/2015	2:00 PM	19,872	497	65	63	256	62	16	4	26
8	"Strive not to be a success, but rather to be of value." - Albert Einstein	7/5/2015	3:30 PM	16,781	345	71	43	146	67	5	1	10
9	"Do not go where the path may lead, go instead where there is no path and leave a trail." - Ralph Waldo Emerson	7/6/2015	8:30 AM	16,152	300	38	35	127	62	17	1	13
10	"To accomplish great things, we must not only act, but also dream, not only plan, but also believe." - Anatole France	7/7/2015	9:00 AM	12,077	196	24	32	99	29	4	4	3
11	"Optimism is the faith that leads to achievement. Nothing can be done without hope and confidence." - Helen Keller	7/8/2015	3:15 PM	12,125	224	39	34	109	34	2		6
12	"The great thing in this world is not so much where you stand, as in what direction you are moving." - Oliver Wendell Holmes	7/9/2015	6:20 AM	11,959	189	21	22	75	45	11	5	7
13	"Only those who dare to fail greatly can ever achieve greatly." - Robert F. Kennedy	7/10/2015	10:15 AM	13,848	221	38	32	74	43	9		18
14	"Failure will never overtake me if my determination to success is strong enough." - Og Mandino	7/11/2015	12:00 PM	13,452	321	28	22	211	46	4	2	7
15	"There are no secrets to success. It is the result of preparation, hard work, and learning from failure." - Colin Powell	7/12/2015	3:00 PM	13,465	272	41	34	134	40	9	3	10
16	"Your present circumstances don't determine where you can go; they merely determine where you start." - Nido Qubein	7/13/2015	9:10 AM	12,739	215	35	28	77	46	9	5	9
17	"What would you attempt if you knew you could not fail?" - Robert H. Schuller	7/14/2015	1:15 PM	10,468	210	11	10	134	39	6	5	5
18	"Faith is daring to put your dream to the test. It is better to try to do something and fail than to try to do nothing and succeed." - Robert H. Schuller	7/15/2015	12:20 PM	11,859	193	25	14	98	40	2	1	13
19	"A ship is safe in harbor, but that's not what ships are for." - William G.T. Shedd	7/16/2015	8:50 AM	11,611	204	38	27	83	41	7		8
20	"You have to go wholeheartedly into anything in order to achieve anything worth having." - Frank Lloyd Wright	7/17/2015	10:00 AM	13,176	225	27	27	110	49	6	1	5
21	"I believe success is achieved by ordinary people with extraordinary determination." - Zig Ziglar	7/18/2015	4:20 PM	17,869	465	80	49	199	81	9	25	20
22	"It is wonderful what great strides can be made when there is a resolute purpose behind them." - Winston Churchill	7/19/2015	11:30 AM	14,631	158	23	24	64	34	7		6
23	"It does not matter how slowly you go as long as you do not stop." - Confucius	7/20/2015	10:00 AM	14,288	418	67	39	202	76	12	1	18



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# CASE STUDY #2-VIDEO TESTS WITH BOTH SMALLER & LARGER SCALE BUDGETS

- Posts with videos attract three times as many inbound links as plain text posts.  
([NewsCred](#))
- Two-thirds of firms plan to increase spending on video marketing in the coming year.  
([Heidi Cohen](#))
- 75% of smartphone owners watch videos on their phones; 26% at least once per day.  
([NewsCred](#))



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# TEST TWITTER'S NEW VIDEO VIEW RELEASE SELECT CREATIVE → VIDEO TO GET STARTED

The screenshot shows the Twitter Ads interface. At the top, there is a navigation bar with 'Ads', 'Campaigns', 'Creatives', 'Analytics', and 'Tools'. On the right, it says 'CFA Institute' and 'Help?'. Below the navigation bar, the word 'Videos' is displayed. Underneath, there are filters for 'All / Tweeted / Not Tweeted'. A list of four video creatives is shown, each with a thumbnail, a title, and a timestamp. The first two are '10868.mp4' (10:48 AM - Aug 7, 2015) and 'Retirement Video.mp4' (3:39 PM - Aug 3, 2015). The last two are 'Nमित\_Arora\_30secs.mp4' (1:59 PM - Apr 27, 2015) and 'Daryl\_Liew\_30secs.mp4' (1:59 PM - Apr 27, 2015). To the right of the list is a green 'Upload a video' button. Below the button, there is a disclaimer: 'By uploading, you acknowledge that your use of the Publisher Tool is subject to the Twitter Terms of Service, Rules, and Twitter Video Player Terms. Please be sure not to violate others' copyright or privacy rights.'



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# CAMPAIGN RESULTS & TAKEAWAYS

- Campaign Objective:
  - Drive Report Downloads Utilizing New Twitter Objectives, Video Views (Auto-Play)
- Campaign Targeting:
  - 19 total tweets promoted
  - Targeted: 1 language·2 audiences·16 interests·51 users·45 keywords
- Campaign Results:
  - 9.8 Million Impressions Generated
  - Average View Rate of 16.28%
  - Average Cost Per View (\$.02)



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# SHORT VIDEOS PERFORM WELL FOR CFA

 **CFA Institute** @CFAinstitute · Jul 28  
@PaulSmithCFA has a special congratulatory message for our CFA Level 1 & 2 candidates #ResultsDay



0:01 / 0:20

 cfainstitute  
Louwman Muse... **FOLLOWING**

70 likes 2w

cfainstitute Today's CFA Institute Pre World Pension Summit on #CapitalMarketsUnion, the ideal #Retirement system and the cost of #pension funds



 cfainstitute **FOLLOWING**

14 likes 21w

cfainstitute Some Images from Day Two of our #FutureFinance conference via @flipagram



FLIPAGRAM

♥ Add a comment... ⋮

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# INSTITUTIONAL INVESTOR: READER'S APPRECIATION WEEK

## FROM THE DESK OF

Allison Adams, Group Publisher



I would like to take the time to thank our subscribers, contributors, editorial board members, advertisers, readers and followers. It is because of your continued support that we have grown into the suite of 11 journals with an award winning research platform, that you know and love.

Since our launch in 1974, Institutional Investor Journals have strived to provide outstanding quality articles that offer in-depth, original and practical research in global investment and finance. Is it for that reason that I would love to hear from you. We invest for our customers based on feedback. We listen and develop what you ask for. So please, don't hesitate to reach out and let us know how we can better serve you.

To express our gratitude we are dedicating September 16 - 20 to you. During Reader Appreciation Week we are offering numerous opportunities to win prizes and save on a new subscription.

Please take a moment to view our Reader Appreciation Week website.

Sincerely,  
Allison Adams  
Group Publisher  
Institutional Investor Journals

ijournals

Instagram



## READER APPRECIATION WEEK

We simply want to say,

THANK YOU

September 16 - 20, 2013



 David Antin	 Joy DeSanto
 Joseph Parsons	 Michael Feinberg
 Michael Peltz	 Mark Lee
 Steve Murray	 Allison Adams

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# CASE STUDY #3-LEVERAGE SOCIAL MEDIA TO FACILITATE CUSTOMER SERVICE AT CFA INSTITUTE



Roughly **1 IN 5** consumers reports utilizing social media at least once to get a customer service response in the past year.

- **Campaign Objective:**

- Develop a voice to address questions and concerns from our candidates, members, and audience on social media
- Roll our Crisis Communications Guide Internally featuring Social Media as a prominent channel



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**Lhorla** @shacquina · 20h  
 Reading the congratulatory tweets sent by @CFAInstitute and I feel more inspired...can't wait to attempt level 1 next june.

RETWEETS 5 FAVORITES 8

2:29 PM - 28 Jul 2015 · Details

Reply to @shacquina

**CFA Institute** @CFAInstitute · 20h  
 Thanks so much, we look forward to having you join us as a Level I Candidate next June...Let us know if we can help in anyway! @shacquina

**Timothy Connolly CFA** @SconsetCapital · 20h  
 @shacquina They offer level 1 in December as well. Not too late! :)  
 @CFAInstitute

**Oosa** @36f9dd1973694ec · 20h  
 @shacquina @CFAInstitute same to me.

**Srikanth Dra** Hats off to CFA institute .they took time to reply most of the comments here . Proud to be part of CFA Program  
 Like · Reply · 2 · 6 hrs

**CFA Institute** Srikanth Dra, Thanks so much, we appreciate the feedback, we're glad to have you as a part of our program, please let us know if we can assist you in anyway.  
 Like · 1 · Commented on by CFA Institute [?] · 2 hrs

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**Alex Razo V** @alejandrорazo21 · 3h

Unfortunately I didn't pass the Level I. Nevertheless I will not give up that easy @CFAInstitute

FAVORITES

3



8:07 AM - 29 Jul 2015 · Details



Reply to @alejandrорazo21



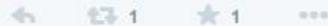
**CFA Institute** @CFAInstitute · 2h

We're sorry to hear you didn't pass but you've got the right attitude! @alejandrорazo21



**Allen CFA Exam Prep** @AllenCFA · 2h

@alejandrорazo21 Love your attitude! All the best!



**Azri Hadi** @azri4all · Jul 28

,@CFAInstitute waiting for my CFA Level II result. So nervous!



**CFA Institute** @CFAInstitute · Jul 28

Deep Breath Azri!!! #BestWishes! @azri4all



**Azri Hadi** @azri4all · Jul 28

@CFAInstitute i fail my level II exam. Need to look back into my Ethics section. Oh well learning is an ongoing process. Be positive 🍷



**CFA Institute** @CFAInstitute · Jul 29

@azri4all We are sorry to hear you didn't pass, but you've got the right attitude!

RETWEET

1



**Ali Adel** @ali\_zaineldeen · Jul 28

CFA has got some sense of humour 😂! \* @CFAInstitute: Michael, don't break your button! Results are on route... #BestWishes @mikkyosakwe"



**CFA Institute** @CFAInstitute · Jul 28

We try our best, we know it's a big day #smile ... #BestWishes @ali\_zaineldeen @mikkyosakwe



RETWEETS  
3

FAVORITES  
6



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CASE STUDY #4, DRIVE ENGAGEMENT ON SOCIAL MEDIA THROUGH CROWD SOURCING EDITORIAL COVERAGE TO SUPPORT CFA INSTITUTE'S #INVESTORSFIRST CAMPAIGN



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# WE ASKED, OUR SOCIAL MEDIA AUDIENCE ANSWERED

**CFA Institute Members** 34,801 members Member

Discussions Promotions About Search Manage

**Marissa Pick** Director of Social Media at CFA Institute

**How would you change finance for the better?**  
Comment (11) · Like (2) · Unfollow 1 month ago

Maurits van der Meer, CFA and Soubhi Canbarieh like this

**Ron Sales, CFA**  
\* Stop allowing anyone to become a Financial Adviser! The Big 5 banks in Canada are terribly guilty of this and there are many people with no real experience or skill selling financial advice in bank branches around the country (Canada).  
2) More access to financial products for individual investors. There are some great investment opportunities out there, but only if you are an institutional player. This is particularly true for "alternative" type investments.  
Like (0) · Reply privately · Delete 1 month ago

**Sandra Krueger, CFA, CAIA**  
Very true Ron. I agree especially with your point access.  
Like (0) · Reply privately · Delete 1 month ago

**Soubhi Canbarieh**  
Agree with Ron. Raise the "barrier to entry" in the financial advisory. CFA designation or equivalent education as min requirement AND registration with IIROC ( equivalent to US Securities and exchange commission in canada) must be a MUST and most importantly better fee disclosure.  
Like (0) · Reply privately · Delete 1 month ago

**Thanh Pham, CFA, CPA**  
I don't think the answer is increase regulations, but increased transparency. Essentially, anything that will improve people's confidence in the markets.  
Like (1) · Reply privately · Delete 1 month ago

**Sophocles Sophocleous, CFA**  
Restrict the size of funds. Funds are too big to perform.

**CFA Institute** Leave a comment below and tell us how you would change #InvestorsFirst

Like Comment

198 people like this. 12 shares

Write a comment...

**Boris Goncalves** The problem is not the finance nor the link of each professional has with the money... Money should not be a final goal but keep a way to make people getting what they need. Need to work on the basis of finance and not see ethics only by the window of disclosure.  
Like Reply 13 · May 8 at 12:50pm  
2 Replies

**Eftekhar Ahmed Saiful** Islamic Finance is the best... And of course, it has to be according to Prophet Hazrat. Meanwhile, USA and UK government, they are trying to force finance for the whole sector. They know, before 1400 years ago...  
Like Reply 3 · May 8 at 4:24pm

**CFA Institute** @CFAInstitute

How would you change #finance for the better #InvestorsFirst

198 people like this. 12 shares

Write a comment...

**Boris Goncalves** The problem is not the finance nor the link of each professional has with the money... Money should not be a final goal but keep a way to make people getting what they need. Need to work on the basis of finance and not see ethics only by the window of disclosure.  
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**Eftekhar Ahmed Saiful** Islamic Finance is the best... And of course, it has to be according to Prophet Hazrat. Meanwhile, USA and UK government, they are trying to force finance for the whole sector. They know, before 1400 years ago...  
Like Reply 3 · May 8 at 4:24pm

RETWEETS 414 FAVORITES 824

**@MarissaPick**  
**#PowerOfPR**

# JASON VOSS COMPLIED INTO A PIECE FOR MARKET INTEGRITY

The article below is broken up by Industry, Client, and Regulatory Level responses

## How Would You Change Finance for the Better?

By Jason Voss, CFA

Categories: [Fiduciary Duty](#), [Short-termism](#), [Standards](#), [Ethics & Regulations \(SER\)](#)



As part of Putting Investors First Month May 2015 we asked CFA Institute constituents via social media: How would you change finance for the better? By the way, if you would like to respond to this thread please do by using the #InvestorsFirst hashtag on social media. Also, be sure to visit the [Putting Investors First](#) website. Here then is a sampling of some of the more interesting responses that we received.

### Industry Level

Many commenters emphasized changing the industry directly. One example repeated multiple times is to alter the incentives so that pay more closely aligns with clients achieving their objectives. Closely related to this suggestion is to change the entire emphasis of finance away from [obsession with returns](#), and instead focus firm and adviser efforts on achieving client's goals.

Among the more adventurous suggestions — again, repeated by many — was to break up the big banks. Just how this should be done was not offered by the contributors. However, in a recent Future of Finance Online Forum, "[Is Finance a Noble Profession?](#)," it was suggested that a return to the finance and banking industry of Glass-Steagall is an appropriate direction.

Another excellent way for changing the industry suggested was for the industry as a whole to begin emphasizing its societal benefit. Many practitioners over the years have said that the benefits of finance are largely ignored in the press and by regulators, while the missteps get endless play. However, our contributors suggested that the entire philosophical focus of the industry must be on creating societal benefit, rather than



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# QUESTIONS?

MARISSA.PICK@CFAINSTITUE.ORG



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