



# Scottrade®

“The biggest benefit of using Vocus PR software is that it makes me more efficient. Now, I can do in one quick step things that it used to take me hours to do.”

– Kelly Doria, Public Relations Manager, Scottrade

## Challenge

Scottrade has a history of opening an average of two branches per month and, as of January 2006, there were more than 250 Scottrade branches in 47 states with more planned. Scottrade’s Public Relations Manager Kelly Doria wanted to reduce the manual tasks involved in day-to-day PR activities, streamline efforts, and create efficiencies to better manage PR as part of the company’s continuous growth and expansion.

## Solution

Vocus provides Scottrade with a comprehensive media database that helps identify contacts and media outlets as the company expands to new markets. Using Vocus, Doria builds world-class media lists and delivers communications to more effectively interact with key contacts in new markets.

## Results

Vocus has allowed Scottrade to better focus PR efforts and resources. Doria can now easily generate contacts on both a local and national level, build multiple media lists, and conduct media outreach and interact with journalists and other key contacts. Using Vocus, Doria has found it much easier to do her job in an ever-growing organization and in ever-expanding markets.

## Scottrade Invested in Vocus Solution: PR Team Successfully Manages Aggressive Company Expansion

### Customer Profile

Scottrade ([www.scottrade.com](http://www.scottrade.com)) allows individual investors to conveniently, comfortably, and cost-efficiently place trades online, while offering the service and added assurance of more than 250 branch offices. The company, created to provide premium service with deeply discounted commissions, currently maintains more than 1.3 million individual accounts. Scottrade has more than 1,400 employees nationwide, including over 500 at its headquarters.

### Challenge

Scottrade has a history of opening an average of two branches per month as part of the company’s philosophy that customers value the option and benefit of a local branch office. To that end, as of January 2006, there were more than 250 Scottrade branches.

The PR support needed for such aggressive company growth and expansion would be taxing on any size PR team. Kelly Doria, Public Relations Manager at Scottrade, wanted to reduce the manual tasks involved in her day-to-day PR activities and create efficiencies so she could concentrate on more strategic aspects of public relations. She needed a comprehensive PR solution to help her manage all her PR efforts in one central system.

### Vocus Solution

Although Scottrade initially looked at other PR software providers, the company felt that Vocus offered the full range of functionality the company sought to manage local and global relationships, all in one integrated solution that was easy-to-use and affordable. “When we were looking, I don’t recall it being a decision to choose anyone else but Vocus,” says Doria.

Doria sought a comprehensive media database that could help her identify contacts and media outlets as the company expanded to new markets. She also needed a solution that would help her build world-class media lists and deliver communications to help her more effectively interact and build relationships with key contacts in key markets. Finally, she needed to track and understand Scottrade’s news coverage- both nationally and at the local level, as well as that of the company’s competitors- to stay on top of important industry news and events. Fortunately, Doria found all this functionality within the Vocus software.

### Reaching Out and Creating Buzz in New Markets

Previously, Doria used manual processes to conduct her media outreach efforts. She used a large Word document to store information on reporters, and then built media lists in an Excel file. This solution was not an effective way to manage PR. According to Doria, “It was like starting over every time you wanted to contact someone.” With Vocus, Doria easily creates

and maintains multiple lists right in the software that are consistently maintained for use at any time, from a master list to lists by city or region. Using Vocus' comprehensive database, it is easy for Doria to search for and identify contacts that cover Scottrade in new markets.

"Every time we open an office in a new city, Vocus is the first place I go," notes Doria. "It makes it so much easier to locate the right contacts in new cities and markets. With Vocus, I know I have the right person that covers my industry."

### **Interactive Communications to Build Relationships**

Vocus also provides a mechanism to easily build relationships with key journalists. "If there are people I need to follow-up with, I can do that easily with Vocus," Doria says. "I can easily insure that everyone I need to reach has been touched at least once." Utilizing the Vocus solution, Doria has found it has reduced her time spent on manual list-building and emailing and has increased her ability to target and reach the right resources in all Scottrade's markets. "Given how many markets we cover, I have limited time and ability to reach out to all reporters in all markets. I couldn't do it without Vocus," says Doria.

### **Tracking the Competition and Promoting Efforts**

Doria also uses Vocus to track Scottrade's news coverage and that of its competitors. As the financial services industry consolidates, Doria says it's key to stay on top of the news about competitors. Doria collects and archives news about Scottrade and any competitors. "If I am asked for news clips on competitors, I know I have that information- and it is easy to locate, pull and distribute to those who need the information."

She also uses news collected through Vocus as a promotional tool- to promote the value of PR and her activities in-house to management and senior-level executives. Using Vocus, Doria can build reports or forward news clips that demonstrate PR activities and the success of her efforts. She notes, "I can give our CEO reports that show all our activities... it is impressive... He can flip through and see how our PR efforts are paying off."

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### **Experienced, Dedicated Customer Service and Support**

Doria also appreciates the level of experience and knowledge of Vocus support professionals. "While other PR software vendors will simply give you a login and a password, Vocus gives us a dedicated team of people who go out of their way to help me achieve success. Vocus support has been really helpful. It's like having your own experts in-house."

Since data is an important part of any PR professional's life, she also values Vocus' attention to detail by making sure that the Vocus media database is always accurate and current. "I really like that, for example, when I find out a reporter has moved on, I can just make a note in Vocus and it's immediately verified and updated by the Vocus team. Other vendors just do not deliver this kind of service," says Doria.

### **Results**

By automating daily PR tasks, Vocus has allowed Doria to better focus her efforts and resources. "The biggest benefit of using Vocus PR software is that it makes me more efficient," notes Doria. "Now, I can do in one quick step things that used to take me hours to do."

Doria can now easily generate contacts on both a local and national level, build multiple media lists, and conduct media outreach and interact with journalists and other key contacts. She is also more easily able to evaluate news coverage on both Scottrade and its competitors. Using Vocus, Doria has found it much easier to do her job in an ever-growing organization and in ever-expanding markets.

### **About Vocus, Inc.**

Vocus is a leading provider of on-demand software for corporate communications and public relations. Our web-based software suite helps organizations of all sizes manage local and global relationships and communications with journalists, analysts, public officials and other key audiences. Our software helps customers manage media relations, news monitoring and analysis, interactive email campaigns, online newsrooms, and government relations activities. Vocus software is delivered as an easy-to-use and cost-effective annual subscription, with no need for internal hardware, software or IT support. Vocus has more than 1,100 customers representing organizations of all sizes across a wide variety of industries. Our software is currently available in four languages, and is in use by customers around the world. Since 1999, we have achieved 23 consecutive quarters of revenue growth, and have received awards for company growth and product excellence. Vocus is based in Lanham, MD with offices in North America and Europe. For more information please visit [www.vocus.com](http://www.vocus.com) or call 800.345.5572.