



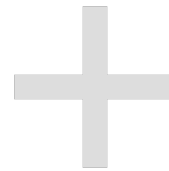
# Solvelt: A Central Problem Solving/Feedback Forum

Alex Sweeney

*Specialist II, Trader Solutions*

# Challenge:

- *As we move towards the completion of the integration, how might we leverage the opportunities brought on by the combined firm (size, scale, history, capabilities, etc.) to **enhance the employee experience** and continue building a culture of inclusivity?*

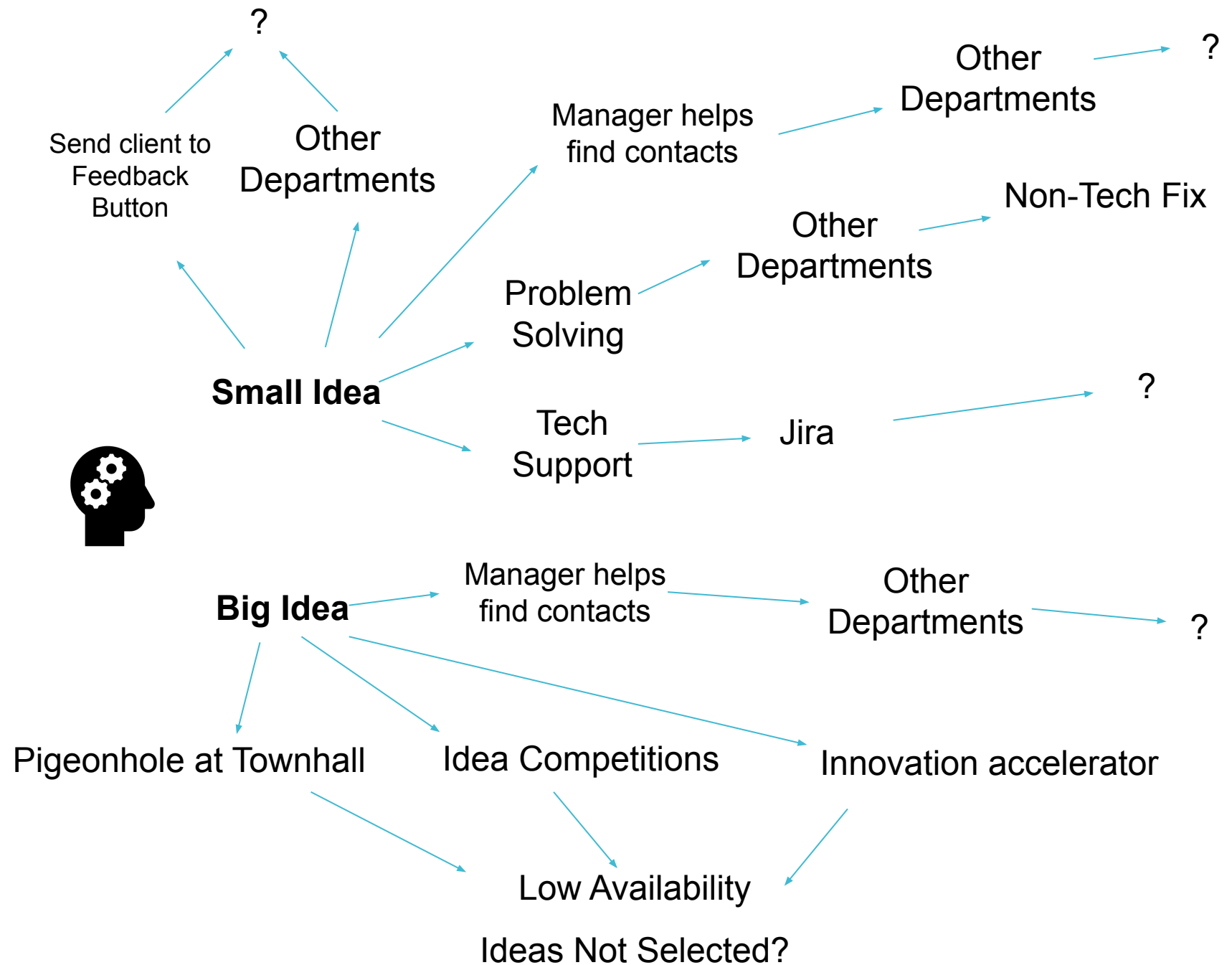
The Charles Schwab logo is a blue square containing the word 'charles' in a white, italicized serif font, with the word 'SCHWAB' in a white, all-caps sans-serif font below it.

*charles*  
SCHWAB

# Enhance the Employee Experience

- Somewhere that values the input of their employees
- Somewhere that can react real time, stay competitive
- How do we get more input from our employees?
- How do we react quickly?

# Current Problem-Solving Process

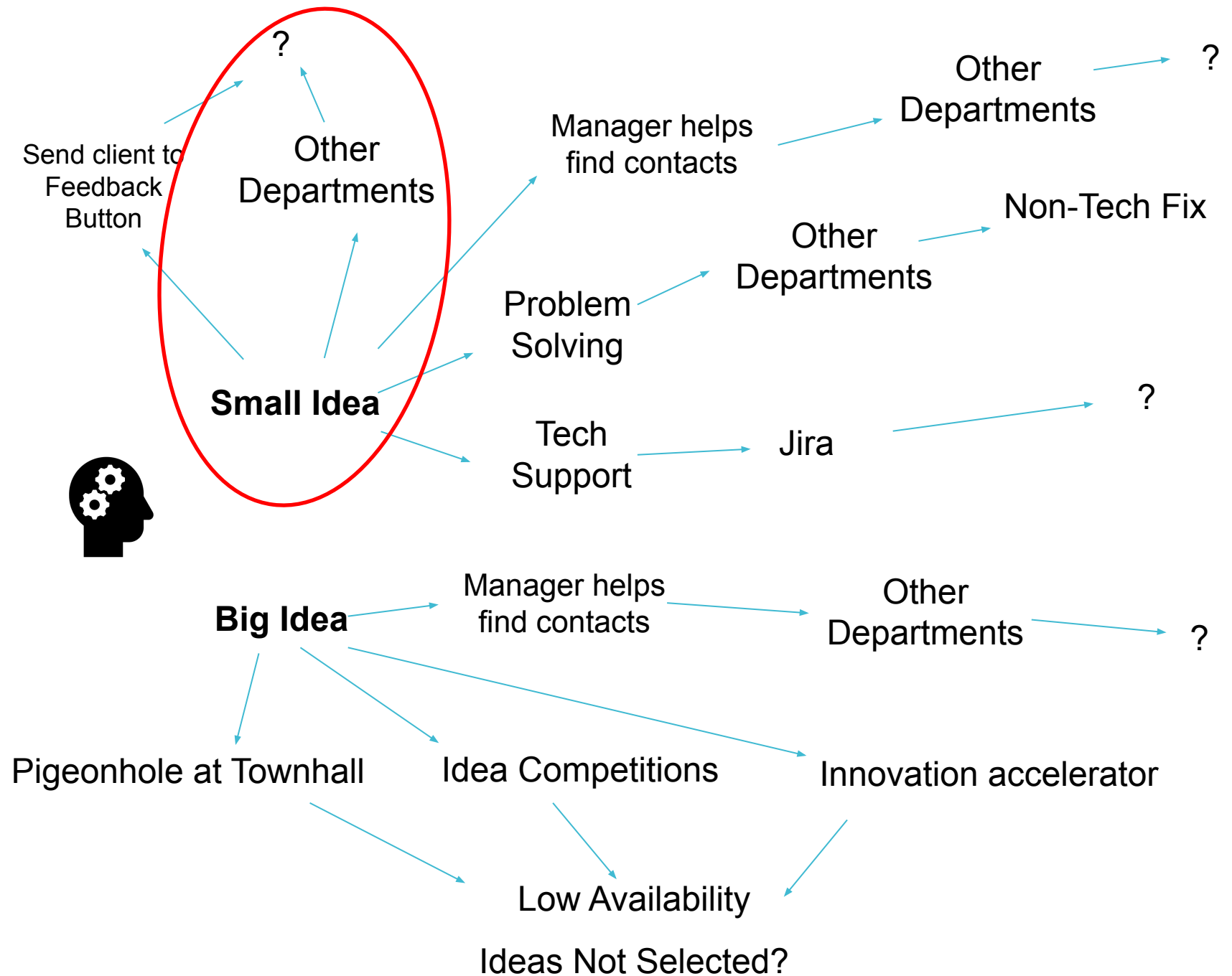


# Example Problem

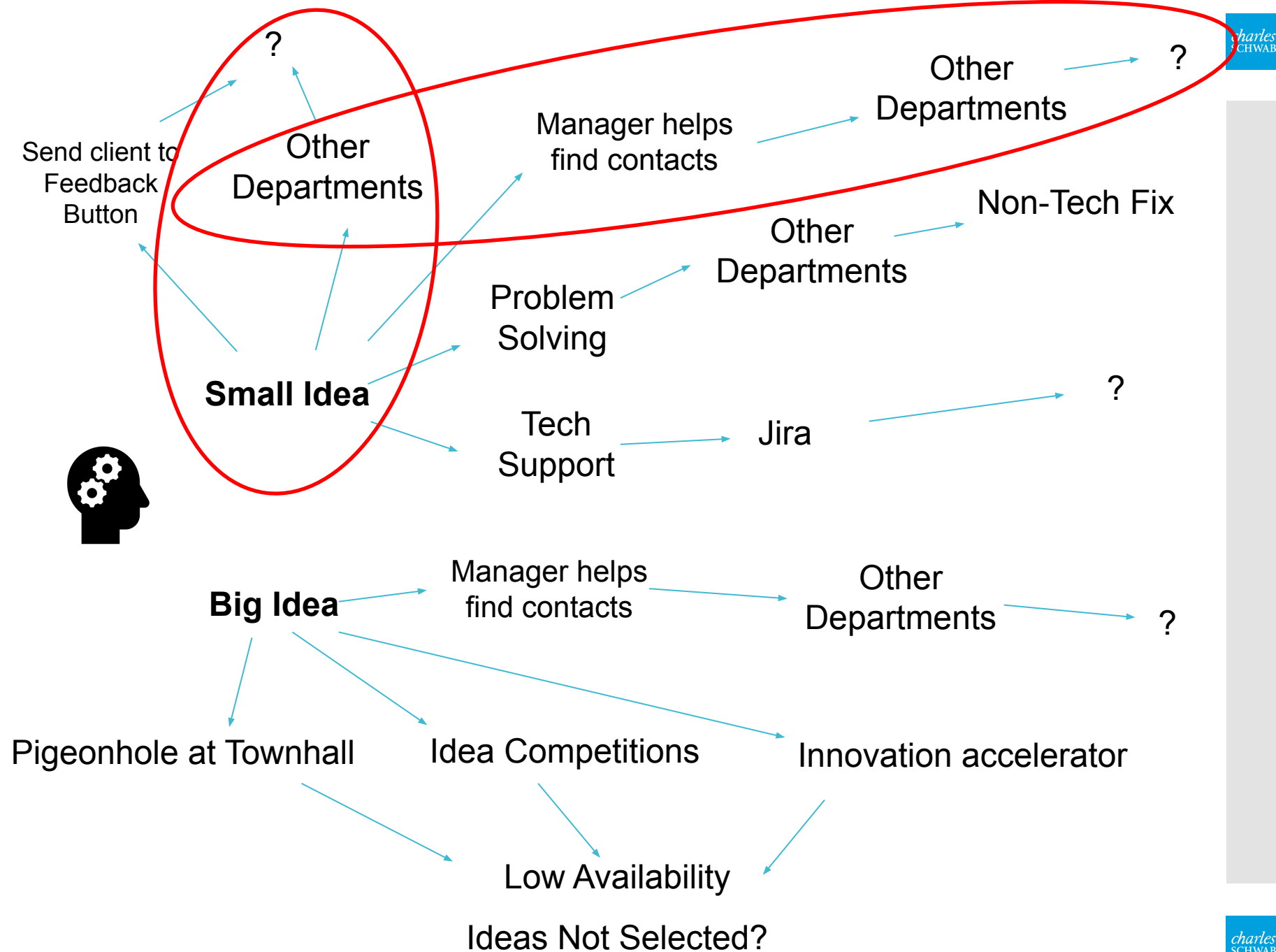
## No Short Interest or Float Data available on Thinkorswim

- Reach out to one department, referred to another
- Discover TOS and TDA website have different data vendors.
  - There's a ticket for this request, no ETA

# Current Problem-Solving Process



# Current Problem-Solving Process



## Solution:



# SolveIt



- An internal-only forum where Schwab Employees(Blue and Green) can post, upvote and comment on ideas
- This will allow all employees to have a larger voice in improving our operations





## Channels:

Investor Services

Advisor Services

Banking

Operations

Business Development

HR

Solvelt

+ Add a channel

## We should add short interest/float data to Thinkorswim



**Alex Sweeney**

Specialist II, Trader Solutions

8/10/21 @12:32 PM

*Many clients have been asking for this lately. It appears we have this data on the TDA website, what would it take to add this to TOS (desktop, web, mobile)*

Short Interest		Share Information	
July 2021		AMC is in a share class of common stock	
Current Month	85.8M	Float	459.9M
Previous Month	79.7M	Shares Outstanding	513.3M
Percent of Float	17.17%	Institutions Holding Shares	337
Days to Cover	0.8723 Days	% Held by Institutions	24.02%



Tags: Thinkorswim Desktop, Thinkorswim Mobile, Thinkorswim Web



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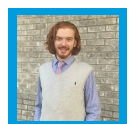
▼ Sort: Top Post First

▼ Current Problems

▼ Thinkorswim

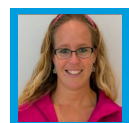
▼ Past 60 Days

Reset Filters



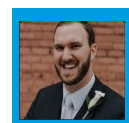
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96  2 



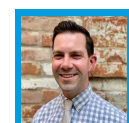
Making P/L figures on Thinkorswim Desktop red and green like how they are displayed on mobile

72  6 



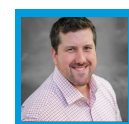
Add YTD, MTD, WTD % change columns in Thinkorswim

65  3 



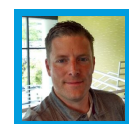
Open our premarket session earlier to compete with the other firms who allow their clients to trade sooner

59  2 



Add company description to Thinkorswim mobile

54  3 



Give clients a choice to remove the “Fast money” and related alerts.

51  7 

321 Results



Channels:

Investor Services

Advisor Services

Banking

Operations

Business Development

HR

Solvelt

+ Add a channel

96 

## We should add short interest/float data to Thinkorswim



**Alex Sweeney**  
Specialist II, Trader Solutions  
8/10/21 @12:32 PM

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Hey Alex, it looks like someone from **@Alice Johnson's** org should have some more insight into this!



**Jane Smith (Moderator)**  
Specialist, CS&S  
8/11/21 @8:55 AM



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## We should add short interest/float data to Thinkorswim



**Alex Sweeney**

Specialist II, Trader Solutions

8/10/21 @12:32 PM

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**Jane Smith (Moderator)**

Specialist, CS&S

8/11/21 @8:55 AM

TOS and the TDA website have different vendors, we are in the process of finding a data vendor for this



**Alice Johnson**

Manager, Team Trading Platforms

8/11/21 @8:55 AM



## Channels:

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▼ Sort: Top Post First

▲ Done

▼ Thinkorswim

▼ Past 60 Days

Reset Filters

Current Problems

Solved Problems

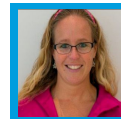
Archived Posts

All Submissions



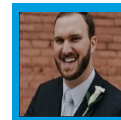
We should add show/hide toggle to Thinkorswim

96 ↑ 2 



Making P/L figures on Thinkorswim Desktop red and green like how they are displayed on mobile

72 ↑ 6 



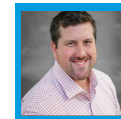
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321 Results

# Needs/Next Steps:

## People:

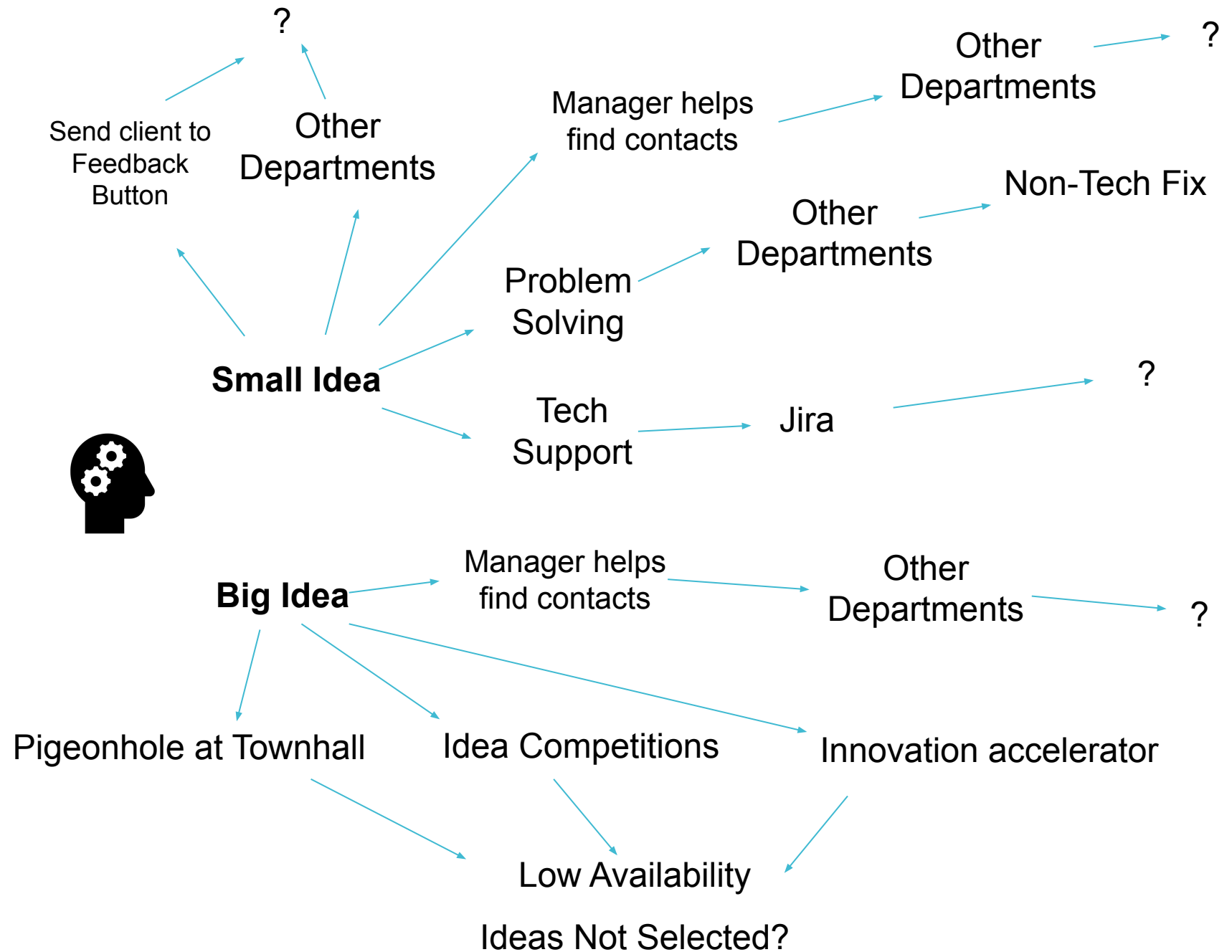
- Input from Employees
- Team to own each Channel, Provide solution delivery.
  - Existing problem-solving teams/Product owners
  - Moderators
- Buy-In from Senior Leadership, Approval (depending on scope)

# Needs/Next Steps:

## Technology: Bright Idea

- Familiarity:
  - Next Innovation/ERG Challenge
  - CS&S/Retail problem solving
  - AS Continuous Improvement
  - Innovation Acceleration Team
- Capabilities
  - Channels
  - Vote
  - Comment
  - Filters
  - Categorize/Pipeline Ideas
  - Tag people
  - Assign Admins
- Cost

# Current Problem-Solving Process





# New Problem- Solving Process

