



Industry
Finance

Purpose
Educate Sales Reps While
Eliminating Travel

Event Date
January 2014

CREATING EFFICIENCY IN THE GLOBAL FINANCIAL SECTOR

The Problem

“No pain, no gain” became a common catch-phrase for an international financial services and investment company, whose team of executives and experts routinely traveled, presenting a series of similar meetings across a broad geographic area.

The Background

The target: high-value clients and prospects.

The goal: meet with key decision makers to gain new clients and deepen opportunities with existing accounts.

For the road show’s team of executives, industry experts and support staff, the two weeks of travel to five different cities bi-annually for eight years was a discomfort that was endured due to the positive outcomes. However, rising challenges associated with the extensive travel necessitated a better solution.

The Challenges

Finances – rising costs for travel, meals, rooms and transportation.

Logistics – complexities of coordinating numerous staff schedules with many venues, clients and prospects, all while planning and delivering a consistent message at five individual meetings. to Christ, they do it all in the name of Jesus and can reach every ear that wants to hear!

Demand – operating within a highly competitive economic environment, where the market is demanding more knowledge of key market and conditions, and more understanding the latest investment strategies, that they are enlisting trusted stewards who can answer their questions and invest their money wisely.



Solution

A viable solution was required to maintain the same level of communication and interaction with existing and potential customers. Dyventive provided the perfect resolution by combining a proprietary HD web broadcast solution with its audio visual expertise. This enabled key communications (via live presenters, slides and video) to be delivered *simultaneously* to every location with a consistent look, feel and appeal. They provided the following deliverables:



- A one-day, nationwide simulcast broadcast with live presentations from each of the five sites. Each site hosted about 100 high-value clients and/or prospects.
- This solution enabled live input from all locations to each presenter, regardless of physical location.
- Employed a state-of-the-art IP Communication System to allow one producer to seamlessly call the entire show for all locations from one communication hub.
- A “TV show-like” feel with audience interactivity was achieved as a result of expert show flow and production recommendations at every location.

In the words of a company rep:
“Not only did our clients love it, we loved it too. It was a money-saver, time-saver, sanity-saver, client-saver and marriage-saver! THANKS!!!”

Tangible Results

Finances – eliminated the cost of 40 flights, 96 nights of lodging and corresponding meals, and transfers. The ROI increased 17% points over past road show results

Logistics – thanks to the web broadcast, *more* became the new common theme. *More* experts were able to present, with *more* clients receiving *more* information, resulting in *more* client engagement.

Demand – greater reach and dissemination of information, resulting in increased client education and triple post-event positive feedback than previous post-event surveys.

The company’s bottom line: Immeasurable opportunity costs and wellbeing benefits by eliminating two weeks of travel involving key executives and expert staff.