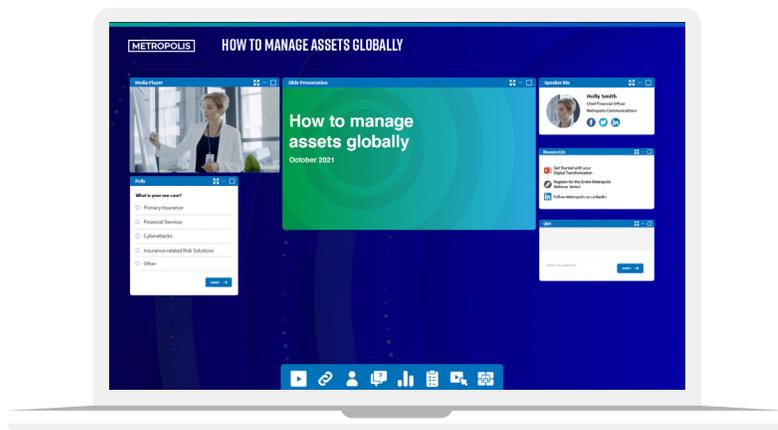


HOW LEADING ASSET MANAGEMENT FIRM ACHIEVED GLOBAL REACH WITH ON24



12-14K

Attendees at major conference



Positive feedback from audiences



Achieved global reach with simulative events



Saved time and resources with ON24 Connect

ABOUT COMPANY

Headquarters: New York, NY

Founded: 1939

Employees: 2300

Industry: Investment Management, Financial Services

This global asset manager manages a range of strategies — including equity, fixed income, quantitative and multi-asset class, private equity, real estate and hedge funds — on behalf of institutions, advisors and individual investors globally.

INTRODUCTION

This global asset manager partners with clients to help them achieve their unique combination of investment goals, risk tolerance, and income and liquidity requirements. To work more collaboratively with investors and clients, the team offers an extensive lineup of investment products as well as access to an array of proprietary educational and thought leadership material.

PROBLEM

A lack of functionality and scalability (No audio, no data, no integration).

The organization's Network Engineer spearheaded the shift to a digital-event strategy in 2020 when COVID-19 accelerated digital transformation and shut the lights on physical events everywhere.

"Our goal is to keep people educated on the latest market insights and investment opportunities, and we discovered that webinars and digital events helped us get that information to prospects and clients across the country," said the Network Engineer.

But their existing webinar and conference software did not support the kind of scale the team hoped to achieve with their digital engagement programs. They needed a solution that would help them go beyond an audio-only experience, attract and engage larger audiences, and capture the first-person insights they needed to better nurture prospective clients and serve existing ones.

In addition, the team needed a way to scale as their programs continued to gain traction. But it was beginning to feel like their webinar program was growing faster than their ability to support it.

"It took us a week just to manually transfer data from our event softwares into our CRM and business intelligence tools (Eloqua and Salesforce CRM)," said the Network Engineer.

The team needed a platform that would help them deliver quality experiences at scale, capture the insights they needed to nurture sales conversations, and streamline the internal process along the way.



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NETWORK ENGINEER

SOLUTION

An engaging, data-driven digital event program.

The team decided to purchase [ON24 Webcast Elite](#) because of its ability to incorporate both audio and video capabilities and engage audiences around the world with fully-branded, interactive digital experiences.

"We loved how many multimedia and interactive elements the ON24 Platform enabled us to include in our webinars," said the Network Engineer. "With ON24, we can build quality experiences for our audiences that include video, polls, Q&A, chat and more. And it takes us half the time."

The best part, according to the Network Engineer, was the ability to track all of the engagement insights generated from their webinars and events to get a better understanding of both current and prospective clients.

"With ON24 engagement scores, we're able to get a really holistic view of the success of our programs," they said. "By monitoring the digital body language of our attendees and tracking their unique interests, we can really see what isn't working and double down on what is."

Using engagement as a metric for marketing success also helped the team fine tune their follow-up strategy by delivering more personalized messaging tailored to the unique needs and interests of each attendee.



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NETWORK ENGINEER

With the simulive feature of Webcast Elite, the team was able to expand into more global markets by running pre-recorded webinars as live experiences for audiences in different time zones or who were unable to attend the live event date. “Running these simulive events also benefited our team and our speakers by allowing them to record their sessions in advance without the unpredictability of a live presentation,” said the Network Engineer.

Another game changer, according to the team, was the ability to integrate the ON24 Platform with the team’s CRM systems: Eloqua and Salesforce. “Now all of the engagement data and insights we collect from our webinars and digital events automatically transfers to our CRMs, which not only lightens our workload, it allows us to better support our sales team with real-time insights they can use to nurture prospective client conversations.”

RESULTS

ON24 enabled this global asset management firm to attract 14,000 attendees to its digital conference. And the ON24 Platform’s ability to power fully-branded, interactive and multimedia digital experiences earned the team a ton of positive audience feedback.

With ON24’s simulive feature, the team was able to achieve global reach by enabling audiences to enjoy the event on-demand without losing the ability to engage in real time with polls, Q&A and chat functionality.

Furthermore, all of those engagement opportunities enabled the team to monitor the digital body language of attendees — both live and simulive — to track intent signals across the buying journey, personalize follow up and inform sales conversations.

By integrating ON24 with their CRM and marketing automation tools, the team saved valuable time and resources. Instead of manually updating or entering engagement insights, the ON24 Platform scores attendees based on level of interest, intent and activity, and populates the information into the company’s business intelligence tools to streamline internal processes and trigger sales action.

To establish brand awareness and scale reach, the team plans to continue making live and simulive experiences available to global audiences and using engagement data to drive ROI and grow business.