

Q: Why Move Advisor Communications from Phone to Internet? A: Superior Participant Experience and Better Value



The **Ethical Funds Company** of Vancouver, Canada, used monthly conference calls as their primary marketing tool. Every month for two years, they hosted coast-to-coast calls with independent Financial Advisors (FAs), who influence final fund sales.

“If you can access an archived webcast and all the PowerPoint slides, it makes it much more meaningful...Otherwise you're just sitting on a phone...”

John Fries
VP, National Sales
Ethical Funds

Challenge: To engage Financial Advisors better than competing fund companies

Ethical Funds is just one of many fund companies using monthly sessions as a marketing tactic. Given the competition for assets, the more engaging the experience for FAs, the greater Ethical Fund's chances of selling their unique socially responsible investing-mandated funds. In short, to maximize sales, **Ethical Funds** needed their monthly events to 'wow' FAs.

By phone, questions were difficult for **Ethical Funds'** presenter to manage. Worse, FAs were reluctant to ask questions in front of the 'crowd' on the phone. And anyone could waste conference time with irrelevant questions. Streamlogics created a question box for **Ethical Funds'** webcasts. Participants email questions during (or any time after) presentations. The moderator selects, re-words or groups questions before they're posted and answered. The number and quality of questions has improved during the events, and **Ethical Funds** has greater control.

Solution: A webcasting program designed with Advisors in mind

In January 2006, **Ethical Funds** replaced conference calls with monthly webcasts. Webcasting is the ability to stream audio and video online. All it requires is an Internet connection and computer. Streamlogics, a webcasting supplier which specializes in the unique needs of financial institutions like **Ethical Funds**, designed special interactive features into these webcasts to improve the FAs' experience.

“Way better than holding a phone to your ear for an hour!”

Streamlogics, created an automated credit issuance application. FAs are more likely to participate because they can qualify for credits.

By phone, when visuals were essential, emails had been sent but rejected often due to spam filters and oversized files. Webcasts have PowerPoint presentations built in. In this visual age, it adds an essential dimension. Finally participants could see and hear.

The webcasts are archived for up to a year. So FAs who miss the monthly webcast can participate later, any time. It's a huge advantage for this west coast company whose "early" meetings are still midday on the other side of the country.

“Audio and Video make the topic easier to understand.”



Ethical Funds Asset Management Webcast User Interface

Results: 50% increase in Advisors in just 18 months

Now **Ethical Funds** is tracking around 120 registered participants per webcast, up from 60 phone lines before: an increase of 50% over 18 months. Better yet, costs are predictable. Conference call charges increase per-minute and per-participant. But webcasts can play to an unlimited audience and charge flat fees. Users are viewing and reviewing the webcasts later, which is good for **Ethical Funds** and the FAs. The value of webcasting trumps the conference call in every aspect.

“I ... will play the presentation again from the archive later.”

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About Streamlogics: Founded in 1999, Streamlogics is a leading global provider of webcasting solutions and services to more than 500 enterprises, government agencies and healthcare organizations. Financial services companies like Barclays, ING and Dundee have trusted Streamlogics to deliver their one-to-many presentations online to a dispersed audience. For more information, email: questions@streamlogics.com