

Creating “live-like” customized events

Wealth advisory firm providing investment management, financial planning, and client education services successfully transforms in-person events to secure, virtual experiences



Challenges

- Provide a professional virtual engagement experience during the pandemic to replace “high-touch” in-person events
- Needed a powerful yet customizable tool to create a “live-like” environment
- Required enterprise-grade security

Solutions

- Lumen® Webcasting created an enterprise-grade fully secure customized virtual experience

Results

- Lumen provided a secure, simple, easy-to-use, advanced branded browser-based experience, allowing for a one-to-many seamless engagement experience
- Lumen’s experienced webcasting agents provided hand on, to help ensure they were comfortable using the product

Challenge

The customer needed a new professional and virtual way to engage with current and prospective clients during the pandemic. As a private wealth management company that frequently used high-touch engagement meetings with clients, they needed a solution that reassured current clients and offered a “live-like” environment. Existing tools were fraught with security issues that concerned their clientele and the legal department. Maintaining a specific aesthetic for their virtual engagements was also important. Providing a branded, customized look and feel to their online events without sacrificing security was paramount. Their existing tool left the high-touch engagement plans falling flat. They needed something better.

Solution

Ease of use

An easy-to-use, customized, and secure solution that enabled high-touch virtual engagement was what they needed. Lumen Webcasting was what they were looking for – a simple yet more advanced virtual event solution that included enterprise-grade security. As a browser cloud-based platform, Lumen Webcasting allowed for one-to-many seamless engagement experiences that required no downloading of apps or software, making it easy for their presenters and audience members to access the presentation and its content afterward.

Their events are informational and educational (e.g. CEO update, tax update, etc.). Before the pandemic, they had not branched out to online events. Now, they were doing them monthly, sometimes multiple virtual events a month. The ease of setting up, customizing, and using Lumen Webcasting was an enormous benefit to their marketing manager, the primary person responsible for all virtual events.

Additional impressive features included quick-to-download webinar recordings available shortly after the event and accessed seamlessly. The previous provider recordings were massive files that took hours to download. “This was a huge selling point. Pulling reports is also so seamless, and the Lumen Webcasting event portal allows us to customize events with our brand, providing a customized webpage to attend with a single link for easy access – this is huge for our attendees.”

Secure

The added security reassurances of adhering to industry best practices and global standards put senior executives at ease and made the switch a “no-brainer” particularly if compared to the security challenges other industry providers faced during the pandemic.

Support team

In addition to the advanced features, Lumen customer service was a standout. “Lumen listened to what we needed. They wanted to know our pain points so they could help solve them. Lumen bent over backward to ensure we got what we needed.” When hosting one of their larger-scale events, they utilized Lumen Webcasting Assist and its virtual lobby, including links to presenter bios, documents from the event, etc. Plus, they had a Lumen customer care rep on board for the test runs leading up to and through the live event.”

““ The Lumen team is great. They’re hands on, helpful and ensure you’re comfortable using the product. It’s so easy and fun, we’re looking at using Lumen Webcasting to host more fun entertainment type events for our clients and team.
— Events Marketing Manager

Results

In a business driven by customer referrals and where trust is paramount, they were able to grow during the pandemic with the help of tools like Lumen Webcasting. They hosted several virtual events using Lumen Webcasting and targeted referral and prospective customers. They then used the available Social Media and CRM integration and API tools to track metrics and inform their lead generation tactics. The results? They signed multiple new clients during the pandemic – without any in-person meetings, an unheard experience before the pandemic.