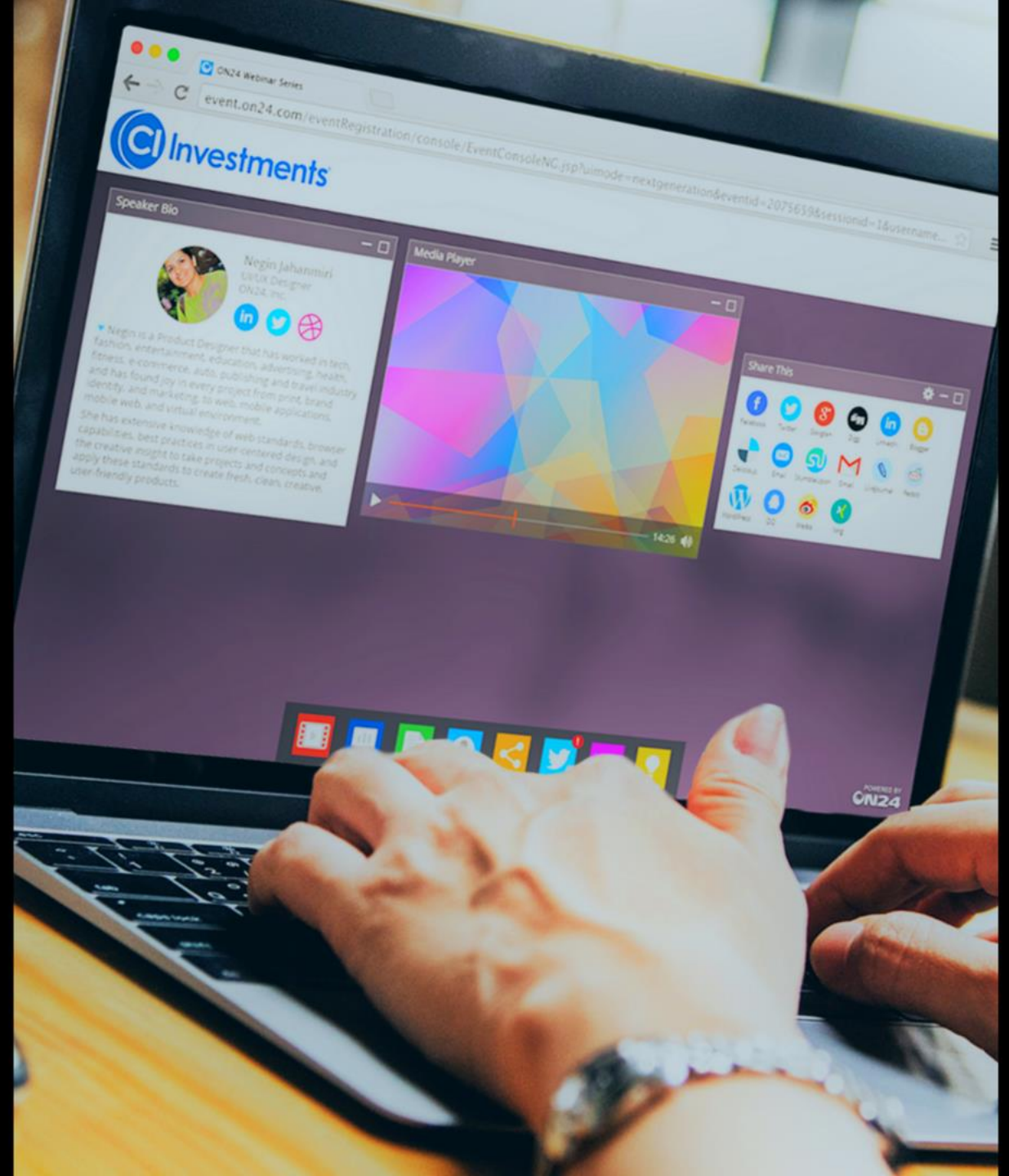


FORCED TO RE-EVALUATE

CI FINANCIAL SELECTS FLEXIBLE WEBINAR PROVIDER

THE
STREAMING NETWORK





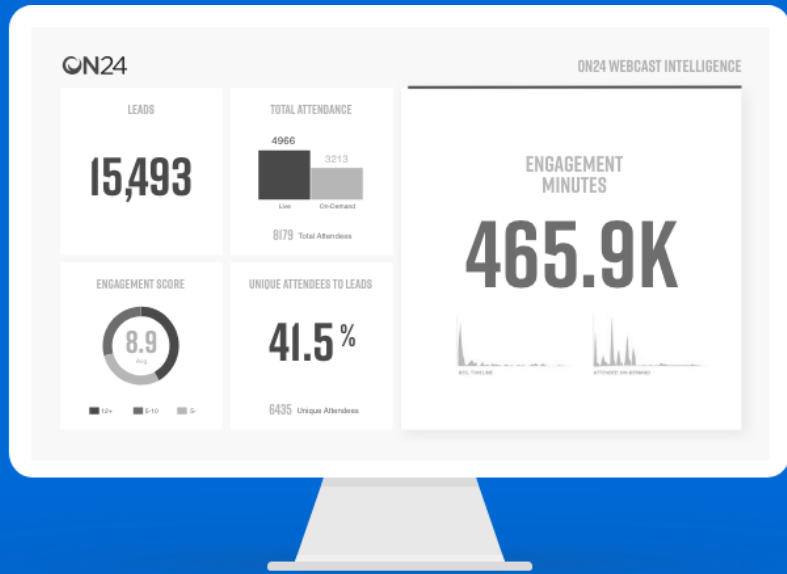
“Our provider of webinar services gave notice they were no longer supporting our unique needs. In our re-evaluation we looked at several new providers. Given our compliance requirements, the need to support both live and pre-recorded content and commitment to providing continuing education (CE) credits, TSN’s offered the best combination of platform and support.”

VOULA MORAN, VP MARKETING
CI INVESTMENTS

THE CATALYST

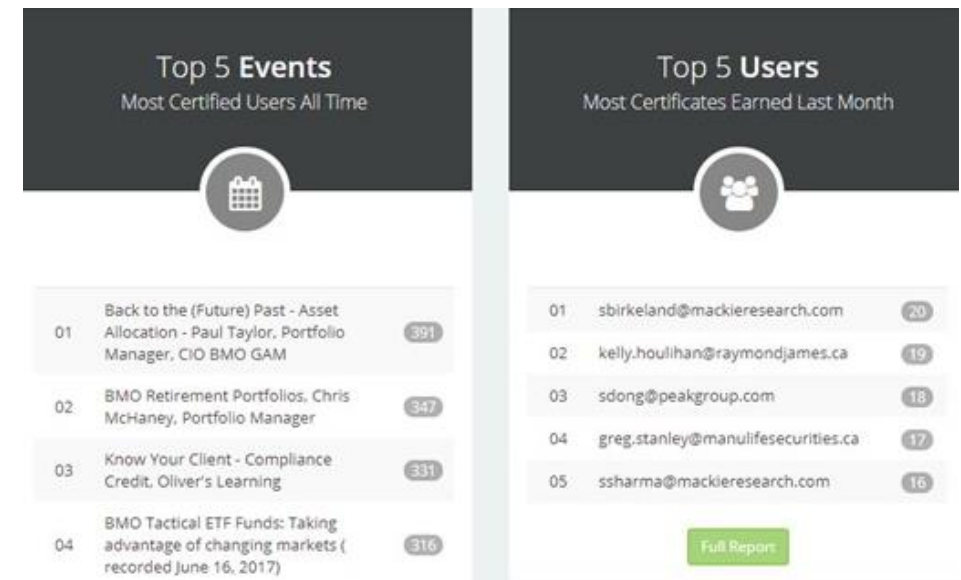
The Canadian wealth management industry has a large financial advisor base. These advisors are continuously targeted by the industry, so getting and keeping their engagement is challenging. CI Financial is an independent Canadian investment company that proudly partners with financial advisors across Canada. CI has recognized that providing timely content in a variety of formats including webinars with continuing education (CE) accreditation has been a winning strategy for advisor engagement.

In Q1 2018 CI’s provider of webinars gave notice that it could no longer support advisor-specific webinars with embedded CE, providing the catalyst for CI to look elsewhere. In the re-evaluation process three objectives became clear. The needs to consolidate onto one platform across the firm, streamlining CE administration and integrating with Salesforce.



CI is a large firm with both manufacturing via CI Investments and distribution through Assante. And with recent acquisitions including Sentry and First Asset, there are multiple departments with various webinar requirements. Getting everyone on same platform would provide cost and operational efficiency. To meet this need The Streaming Network’s (TSN) provided a one platform solution with ON24 Elite, a fully cloud-based webinar tool. Using a parent and child account structure, pricing and service was standardized across the firm. Training and webinar templates were also standardized so that webinars are faster to clone and produce and various departments can cross-share platform experiences.

CE is a great incentive for advisors but can be administratively challenging for the firm. Looking at CE more closely, there was an interest at CI to consolidate all CE workflow for venue as well as virtual sessions onto one cloud-based software solution. TSN’s CE Central, which integrates directly with ON24 Elite was chosen. While most platforms deliver CE on an event-by-event basis and data is isolated, TSN’s CE Central provides a single view into all CE activity including venue and virtual based sessions. This single view is for all stakeholders, including the advisors, firm CE administrators and marketing leadership.



IN CONCLUSION

Webinars generate a great deal of both demographic and behavioural data. CI recognized that while the webinar analytics are incredibly valuable alone, they become invaluable when integrated with Salesforce CRM. Using Scribe, the ON24 Elite platform integrates with Salesforce and the TSN Integration Service is flexible and configurable, allowing it to adapt to CI's unique marketing workflow. Also, over 30 types of webinar metrics can be delivered to Salesforce, including viewing duration, level of engagement, poll responses and user questions giving CI a range of options for how it collects and stores data.

In summary, we are excited about our new partnership with CI Financial. The ability for us to centralize the end-to-end production and delivery of webinars across this large firm will deliver cost and production efficiencies to the firm. Advisors will get a consistent user experience across the brands including CI Investments, acquired firms and Assante.



“At the end of the day we are a large asset management firm with various webinar requirements across departments. TSN’s solution is very flexible and serves the common requirement of providing the data needed to track our success.”

VOULA MORAN, VP MARKETING
CI INVESTMENTS

THE STREAMING NETWORK

1700 +

FINANCIAL SERVICES WEBINARS,
WEBCASTS & VIRTUAL EVENTS
IN THE PAST 12 MONTHS

280k +

CE CREDITS ISSUED TO THE
CANADIAN ADVISOR
COMMUNITY IN PAST 12 MONTHS

27k hours

OVER 27 HOURS OF ENGAGEMENT
ON FINANCIAL SERVICES WEBINRS IN
THE PAST 12 MONTHS

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