



Case Study: GlobalMeet Webcast

“GlobalMeet Webcast is easy to use and secure yet allows us to fully customize the look and feel of our events for our audience.”

Sydney Church, Marketing Manager



Why Altair Advisers chose GlobalMeet Webcast to engage with current and prospective clients during the pandemic

Altair Advisers

Altair Advisers is an independent wealth advisory firm providing investment management, financial planning, and client education services. The firm counsels a select group of individuals, families, foundations and endowments, and serves as an advocate for its clients providing objective advice and comprehensive guidance across all aspects of its clients' financial lives.

The Challenge

During the pandemic, Altair needed a new and professional way to virtually engage with current and prospective clients. As a private wealth management company used to high-touch engagement with clients, Altair needed to find a way to reassure existing clients and engage in a 'live-like' environment. Existing tools were fraught with security issues and concerns from clientele. And lack of ability to customize left the high-touch engagement plans falling flat. The firm also needed a certain aesthetic for its virtual engagements and the ability to customize the look and feel of an online event without sacrificing security.

The Solution

Altair needed an easy to use, customized and secure solution that would enable high-touch virtual engagement. GlobalMeet Webcast was exactly what Altair was looking for – a simple yet more advanced virtual event solution, including enterprise-grade security. GlobalMeet Webcast is a cloud-based platform that allows for the one-to-many seamless engagement.

Altair's events are primarily informational and educational (e.g., CEO update, tax update, etc.). Before the pandemic, Altair had not yet branched into online events. Now they are doing them monthly, sometimes multiple virtual events a month.

The ease of setting up, customizing and using GlobalMeet Webcast has been beneficial to Sydney Church, marketing manager at Altair Advisers, who is responsible for all virtual events. “The team at PGi is great,” commented Church. “They are hands on, helpful, and ensure you're comfortable using the product. It's so easy and fun, we're looking at using GlobalMeet Webcast to host more fun entertainment type events for our clients and team.”

Ease of Use

GlobalMeet Webcast includes some helpful, impressive features. Webinar recordings used to take hours, or a full day, of Church's time. Her previous provider's downloads were massive files that took hours of time. With PGI, recordings are available shortly after the event and are seamlessly accessed. "This was a huge selling point," noted Church. "Pulling reports is also seamless, and GlobalMeet's Webcasts event portal allows us to customize events with our brand, providing a customized webpage to attendees 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 Altair executives at ease and made the switch a "no brainer" in light of the security challenges other providers in the industry faced during the pandemic.

Support Team

In addition to the advanced features, PGI's customer service was a standout for Altair. "PGI listened to what we needed. They wanted to know our pain points so they could help solve them," added Church. "PGI bent over backwards to ensure we got what we needed – even as a small customer who often gets overlooked." And when Church was hosting one of Altair's larger scale events, she utilized GlobalMeet Webcast Assist which came with a virtual lobby, inclusive of links to presenter bios, documents from the event, etc. And, Church had PGI Customer Care on board for the test runs leading up to and through the live event.

Results

In a business driven largely by customer referral and where trust is paramount, Altair was able to grow during the pandemic with help from tools like GlobalMeet Webcast. Altair hosted a number of virtual events using GlobalMeet Webcast to target referral and prospective customers. The firm signed on multiple new clients during the pandemic - without any in-person meetings.

