

CORPORATE COMMUNICATIONS SERVICES

INCREASING EFFICIENCY WITH WEBCASTING

A BEST PRACTICES GUIDE FOR ASSET MANAGERS AND WEALTH ADVISORS

In response to the recent financial crisis, disclosure regulations and marketing practices have all shifted in favor of increased transparency. Investors are demanding that their fund managers provide more frequent performance updates and communications regarding their investment outlook. These changes are occurring at a time when you're facing budgetary constraints and your leadership team doesn't have the time to travel across the globe to meet with investors. So, how can you effectively meet the demands of your stakeholders in this environment? Use webcasting.

You may know Thomson Reuters as a leading source of financial information and workflow solutions, but for more than a decade, we've been a leading provider of webcasting solutions to more than 5,000 companies worldwide, including 90% of the Fortune 500. Through our distribution network, we help our clients deliver their communications directly to thousands of corporations, institutional investors, pension managers and registered investment advisors. Leveraging our unique experience working with the institutional investment community, we have identified the best practices for effectively using webcasting to communicate with investors. Use this secure, cost-effective, and measurable communications tool to:

- Solidify relationships with investors
- Attract additional assets
- Differentiate your fund managers through thought leadership content
- Comply with disclosure regulations

Here's how.

Engage your audience. When in-person meetings with investors are not practical or feasible, video webcasts offer the most compelling alternative. Your fund managers can speak directly to their clients in all regions, delivering a consistent message supported by PowerPoint slides and documentation. As a result, clients benefit from a much more engaging experience than a conference call, whereby they are able to have virtual "face time" with your management team.

Reinforce your brand. In today's marketplace it's essential to increase visibility and differentiate your brand from competitors. Customize the look and feel of the webcast player, registration form and confirmation emails to incorporate elements of your corporate identity.

Select the appropriate level of security. Webcasting offers multiple security measures, from online registration to password-protection and the ability to restrict access of specific users. Work with your webcast event manager to determine which security measures you should implement for each of your communications. For example, a message targeted only to your clients should require more secure access than a thought-leadership webcast which can be used as a lead generation tool and could be distributed to a wider audience.

Develop a script. To accelerate the legal and compliance review process, develop a script of the information your speakers will be presenting. The approved text can then be loaded onto a teleprompter, ensuring your speakers stay on message, and enabling quicker recording of the webcast. Even if the presentation section of the webcast is pre-recorded, you can still allow for a live question and answer period at the end.



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Reach your target audience. Promoting your communications in a targeted way is key to the success of your overall strategy. However, finding effective distribution channels through which to spread your message can be an expensive exercise in trial and error. Work with your webcast provider to identify opportunities to expand the reach of your message to the institutional investment community in a more measurable, cost-effective way.

Use polling to gauge client sentiment. Incorporate a poll within your webcast to learn how your audience views a specific issue or topic related to the information being covered. The poll will be displayed to participants through the webcast player requesting a response to your question. The results are tabulated in real-time providing you with an instant view of the sentiment.

Allow for Q&A via the webcast player. By enabling your audience to type in their questions directly through the webcast player, you can determine which questions to answer during the live question and answer period, and which to follow-up on individually after the event. The webcast player Q&A functionality easily tracks the submitted questions and response status. Because a webcast offers your participants an additional layer of anonymity over an in-person meeting, they are also likely to pose more candid questions, giving you more visibility into the topics that are top of mind.

Conduct an exit survey. Following your webcast, send a customized survey to the webcast participants to better understand which aspects of your presentation resonated and which did not work as well. You can also use this 'exit survey' to gather information around emerging trends relevant to the content covered in the webcast to help you plan your next communication.

Measure the impact of your webcast. In addition to the polling question, exit survey and Q&A—all of which provide valuable insight into the impact of your communication—you can also access detailed webcast metrics, both at the individual attendee level and in aggregate for all attendees. For example, view graphs that visually indicate when participants logged on and off, enabling you to gauge which sections of the presentation were most engaging to your audience. These analytics will help you provide a clear picture of your webcast's success to internal stakeholders.

About Thomson Reuters

Thomson Reuters is the world's leading source of intelligent information and workflow solutions for businesses and professionals. Our webcasting and on-demand video services help over 5,000 clients worldwide meet their business communication needs, including client outreach, employee engagement, marketing & branding, corporate messaging and IR communications. Use our cost-effective solutions to engage your global audiences without expensive travel or teleconference costs and increase the measurability of your results.

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