



PROFESSIONAL ASSOCIATION CONNECTS GROWING GLOBAL CHAPTERS WITH OPERATOR ASSISTED CALLS



The Chartered Alternative Investment Analyst Association® (CAIA) is a world leader in alternative investment (AI) education. As CAIA continues expanding their global membership base and evolving their programs, communication and collaboration with worldwide chapters becomes increasingly important—and more challenging. Taking the first step towards their vision, the association adopted PGI’s Operator Assisted Conference Calls as a primary vehicle for their membership outreach.

CHALLENGES FOR GLOBAL CHAPTER COMMUNICATIONS

Over the last 12 years, CAIA has made growth and awareness key goals. With new CEO William (Bill) J. Kelly on board and a mission for better transparency and information sharing, CAIA initiated

new strategies in 2014 to coordinate with their 18 global chapters.

Kelly visits these chapters on worldwide tours to personally engage with and elicit feedback. Upon returning, he follows up with all chapters to communicate new happenings within the organization. However, CAIA’s avenues of communication—email and a members-only website—lack the immediacy and easy access to compel members to communicate with each other and join the conversation.

NEED FOR A SOPHISTICATED AUDIO PROVIDER

CAIA needed a sophisticated platform for fast, frequent knowledge sharing to communicate goals to global members. Chapter Relations Manager Heather Morales, who manages the association’s

CUSTOMER

Chartered Alternative Investment Analyst Association

INDUSTRY

Alternative Investment Education

HEADQUARTERS

Amherst, Mass.

YEARS IN BUSINESS

Since 2002

SOLUTION

Operator Assisted Audio

CHALLENGE	SOLUTION	RESULTS
To accomplish their vision of transparency and increased information sharing, CAIA needed a solution for engaging and communicating with thousands of global chapter members across time zones.	CAIA uses PGI’s Operator Assisted Audio Conferencing solution for professional, easy, cost-efficient quarterly calls.	Event management and operator assistance simplifies conference calls for both hosts and guests, increasing attendance. Post-event reports and recordings track and support continued engagement.



relationships and events, looked to new tools for quarterly conference calls.

When considering an audio conferencing provider, professionalism, accountability, track record and, since they are a non-profit organization, cost were key factors in their buying decision. At a colleague's recommendation, Morales and her team chose PGI. In fact, the referral was so confident and positive, that they didn't even consider other providers. For CAIA, choosing PGI was a necessity for more professional, organized and cost-effective conference calls.

THE OPERATOR ASSISTANCE DIFFERENCE

Before CAIA selected PGI services, they held their first one-hour quarterly call using standard audio conferencing. Although the content was engaging and relevant, the lack of operator support led to a disorganized meeting with people talking simultaneously during the Q&A. Morales said, "After this first impression, it was a huge challenge to make it look more buttoned up for future calls."

With the upgrade to PGI's Operator Assisted Audio Conferencing, the Q&A is now professionally moderated giving the CAIA team time to consider and thoughtfully respond to questions.

PROFESSIONAL, ORGANIZED MEETINGS FOR SUCCESS

Morales believes hands down that the operator assisted calls have led to more professional and successful quarterly calls. "Now, it's just really fluid and easy. It's a pretty organic process." On the day of the event, Morales and her team connect early to talk to the operator regarding the format of the call.

"Getting that reassurance and being able to dial in 15 minutes prior puts everybody's mind at ease. Everybody's really professional, and having them be calm helps us be calm."

— Heather Morales

PGI HELPS CAIA INCREASE MEMBER ENGAGEMENT

Operator assisted conference calls help CAIA promote program adoption with greater reach and less travel, as well as:

- **Retain Existing Members:** These events show existing members they are valued, and the increasing outreach engages lapsed members and stalled candidates.
- **Improve Membership Service:** Calls with chapter heads produce questions, suggestions, issues and resolutions that help the association improve membership programs.
- **Support New Growth:** Audio conferencing offers scalability to support membership growth, and PGI also supports custom calls and online events with video for future needs.
- **Engage Across Time Zones:** Almost immediately after exiting the call, Morales receives the event recording to follow up with absent attendees due to time zone issues. "Getting the recording and being able to share it has been a huge return on our investment," Morales said.
- **Track Engagement:** With attendance analytics, CAIA better targets and follows up with members and creates accountability for members' attendance.

"We've taken the calls to the next level. There's that personal touch; it's not just automated. Callers actually get to talk to somebody. It helps a lot because they feel like they're not forgotten on the line."

— Heather Morales

ABOUT PGI

PGi is the world's largest pure-play provider of collaboration software and services. PGI's unified collaboration platform empowers business users and teams to connect, share ideas and manage projects with the simplicity and everywhere-access of the latest cloud technologies. PGI has a global presence in 25 countries, and its award-winning solutions provide a collaborative advantage to nearly 50,000 enterprise customers, including 75% of the Fortune 100™. In the last five years, PGI has helped over a billion people worldwide connect, collaborate and get work done—in teams, large groups and one-on-one. For more information, visit PGI at pgi.com.