# **Case Study:** How a Global Insurance Leader Transformed Advisor Education and Saved \$75,000!

A leading global insurer and asset manager needed an innovative digital solution that could engage The Challenge advisors, drive product understanding, and create lasting impact for their client base.

## The Current State

### Goal:

Deliver premium CE webinar experience to targeted advisors while reducing production costs and achieving breakthrough engagement levels.

Employees:

157,000+

#### Financial Measure: \$2,100 Billion +

Presence:	Global
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	Insurance &
Sector:	Asset
	Management



Contact us: 

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**Our Solution:** A high-impact and easy to implement digital CE webinar targeting financial advisor audience.



Implemented three-session summit on buffered ETF mechanics, trading, and portfolio strategies.

## The FLX Advantage

**Cost Savings** 



- 60% cost reduction (\$15,000 → \$6,500) through streamlined execution
- \$8,000 annual savings by eliminating separate CE compliance tool licensing fees
- \$70,000+ avoided in salary and benefits by eliminating dedicated CE coordinator hire



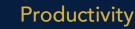
Delivered comprehensive event management from initial planning through execution to post-event analytics.



Maximized advisor outreach through multi-channel marketing to 100,000+ qualified professionals

### **Growth Potential**

- Achieved strong 58% attendance conversion with 206 financial advisors participating live
- 30%+ of webinar attendees became gualified sales leads, doubling previous conversion rates
- Attracted 352 high-quality registrants through targeted distribution to credentialed professionals





- 25+ staff hours reclaimed through automated administrative workflows
- 8+ hours saved with instant CE certificate generation and compliance tracking
- Streamlined multi-speaker coordination eliminating 10+ internal planning meetings