

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

The Challenge A leading global insurer and asset manager needed an innovative digital solution that could engage 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

Sector: Insurance & Asset Management

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.



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

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

Growth Potential



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

Productivity



- 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