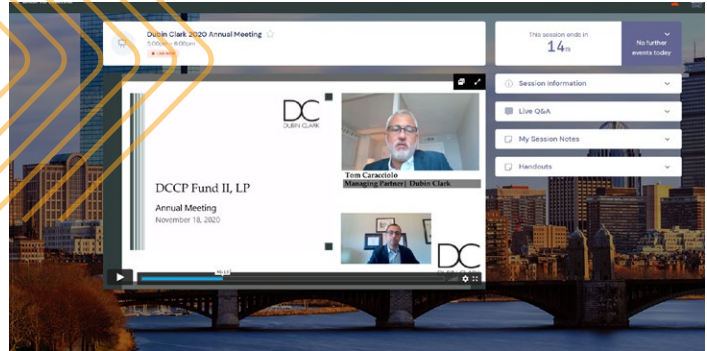




SMARTSOURCE

PRIVATE EQUITY FIRM HOLDS ANNUAL MEETING VIRTUALLY



BACKGROUND

A private equity firm recently partnered with SmartSource® to produce their annual meeting virtually. The firm needed an effective, secure way to bring its limited partners together for an annual investor meeting despite not being able to meet in person.

CHALLENGE

Board members had different technology requirements and were located across the U.S., so it was a challenge to ensure that all could present in the professional manner the meeting warranted. In addition, 60 VIP investors needed to be kept engaged and not caught up in the details of technology challenges. With a year that has provided unique obstacles, the details of pulling out all the stops to create a virtual event that was secure and seamless for stakeholders was crucial. The client group was not familiar with event production, so SmartSource needed to lead the way behind the scenes, from planning to production, while also ensuring the highest level of confidentiality and security.

SOLUTION

SmartSource got the team thinking about what was most important to their investors. Once the client shared their vision for the event, SmartSource virtual event producers translated the client's vision into an actionable plan. SmartSource was able to utilize its Event Hub as a central location for attendees to log in and view the presentations. The Event Hub is ideal for board meetings and other meetings that require security to ensure a confidential virtual meeting experience. Because security was a crucial element of concern, only registered participants who received a unique pin code were able to view the video stream.

SmartSource created an event flow and established the timing of each presentation – a combination of live and pre-recorded – as well as how each segment, from breakouts to transitions from one presenter to the next, would be done. This was critical for keeping the participants engaged. SmartSource provided each speaker with a professional presentation kit, which included a robust laptop equipped with full HD camera and enhanced audio.

A full dress rehearsal with all presenters was conducted, walking them through the entire event, while the event producer narrated the action taking place onscreen. This provided time to coach the presenters, ensuring they had thought through how to tee up one segment to another, something not often considered by a presenter. The producer stayed in touch continually with all presenters to share information they needed to know, to advise when to log in, how to use the slide advancer, etc., providing that extra touch of service behind the scenes.

“Working with the team at SmartSource made our virtual annual meeting seamless. We received numerous compliments from our LPs, with several expressing that it had been the most impressive virtual meeting they’ve ever attended. I would absolutely recommend them to anyone looking for an elegant virtual meeting solution.”

-Tom Caracciolo, Managing Partner
Dubin Clark