



SMARTSOURCE

RAYMOND JAMES

Elevating A Partnership With The Right Solution and Service



BACKGROUND

As one of the country's largest full-service wealth management and investment banking firms, Raymond James holds between 150-200 events per year, ranging from smaller regional meetings to large national events with thousands of attendees. Taking place annually, the Raymond James Financial Services ELEVATE national conference is the company's largest event. In addition to serving as a training and continuing education conference, the meeting is also a platform to recognize the company's top producers, recruit new talent, and allow independent advisors to connect with their peers and firm leaders, expand their knowledge, and explore new ideas.

CHALLENGE

With approximately 4,000 attendees, the ELEVATE conference spans several rooms with about 130 presentations over the course of four days. In the past, Raymond James's internal team of meeting technology advisors managed the entire event themselves, with each presenter bringing their own presentation materials and uploading the supporting digital files at the event.

As the meeting evolved, there was a need for greater file security to protect proprietary data. The company determined that they would need to gather the presentations from each speaker in advance and pre-load them onto Raymond James computers. However, with only three internal meeting technology employees, the company did not have the staff required to manage this process.

SOLUTION

At the ELEVATE conference, held at the Gaylord National Resort in Washington DC, SmartSource established a centralized presentation room that allowed for simultaneous control of presenters throughout all twelve rooms of the event. Each presentation station was equipped with a Raymond James computer that had been pre-loaded with all of that speaker room's presentation materials. This allowed for centralized control of each simultaneous presentation taking place in various rooms. In addition, a project manager was positioned in each of the twelve rooms to provide hands-on management of each presentation.

With such a large event, there's a significant financial investment at stake, and nothing should be left to chance. This solution provided a true extension of the Raymond James team, so they were able to have eyes, ears, and helping hands throughout the entire event to accommodate the production needs of each presenter. The SmartSource team worked to ensure that the event went seamlessly and even jumped in to immediately rectify any issues that occurred outside the scope of their work. Raymond James was so pleased with SmartSource's performance at the national conference that they not only plan on working with SmartSource for future presentations, but they also plan to start relying on the company to handle the AV and equipment portion of their events, something they previously allowed the venue's on-site staff to handle.

"SmartSource[®] provided the best value of any of the vendors we hired. In addition to the success of their presentation management solution, SmartSource staff goes above and beyond to help with issues outside their service. Having professionals on site who want to get the job done no matter what that job is makes our lives a lot easier."

- Greg DePotter, Meeting Technology Advisor, Raymond James