



Professional Association Connects Growing Global Chapters with Operator Assisted Calls

CAIA adopts PGI's Operator Assisted Conference Calls as a primary vehicle for communication and outreach with their membership base.

The Chartered Alternative Investment Analyst Association® (CAIA) is a world leader in alternative investment (AI) education. With alternatives currently representing \$10 trillion in assets under management, CAIA helps financial professionals become educated on alternative investment education to meet their globally-recognized highest standard of achievement for AI professionals.

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 communication and outreach with their membership base.

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.

Global chapters are the closest points of contact for members where CAIA's staff cannot be. To keep their vision aligned, the association needs ongoing communication and interaction with

them. Kelly visits these chapters on worldwide tours to personally engage with and elicit feedback from chapter members.

Upon returning, Kelly likes to follow up with all chapter regions to communicate new happenings within the organization, show recognition to the chapters he visited, and solicit new ideas. 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

Amidst rapid growth and geographical expansion, 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 relationships and events with 15 worldwide chapters across EMEA and AMRS, 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's 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 resulted in a more disorganized meeting with many 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 conference 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.

In addition, operator assisted calls have the capacity to support the potential audience for each event. While attendance rates hover around 50 users now, the association invites up to 200 members and needs a solution to support the event as it grows.

Professional, Organized Meetings for Success

Morales believes hands down that the operator assisted calls have led to more professional and successful quarterly calls. To prepare for the conference call, Morales works closely with her account executive to understand exactly what she needs to organize the event.

"Jack's been fantastic, a pleasure to work with, and I really appreciate his help," Morales said of PGI Account Executive Jack Davis. "Now, it's just really fluid and easy. It's a pretty organic process."

On the day of the event, Morales and 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," Morales said.

"Everybody's really professional, and having them be calm helps us be calm."

— Heather Morales, Chapter Relations Manager, CAIA

PGi Helps CAIA Increase Member Engagement

Operator assisted conference calls help CAIA promote program adoption with greater reach and less travel for their geographically dispersed global chapters, 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, target content and tailor ongoing education, as well as better allocate budgets for chapter resources.
- Support New Growth: As opposed to email and travel, audio conferencing is a sustainable collaboration tool with the scalability to support growth as membership becomes more widespread. PGI's portfolio of collaboration and event services offers the potential for more custom calls and online events with video.
- Engage Across Time Zones: Scheduling a time that chapters across the world all find convenient is challenging, but immediately after the call, Morales receives the event recording to follow up with those who missed the event due to scheduling. "Getting the recording and being able to share it has been a huge return on our investment," Morales said.
- Track Engagement: Audio conferencing analytics expose who's on the call and even when they dialed in and ended the call. With attendance analytics, CAIA better targets and follows up with members, a critical component they had been missing. "We're also allowed to make them "accountable for their attendance," Morales said, which is another added benefit.

"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, and the operator checks back in with them. It helps a lot because they feel like they're not forgotten on the line."

— Heather Morales

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