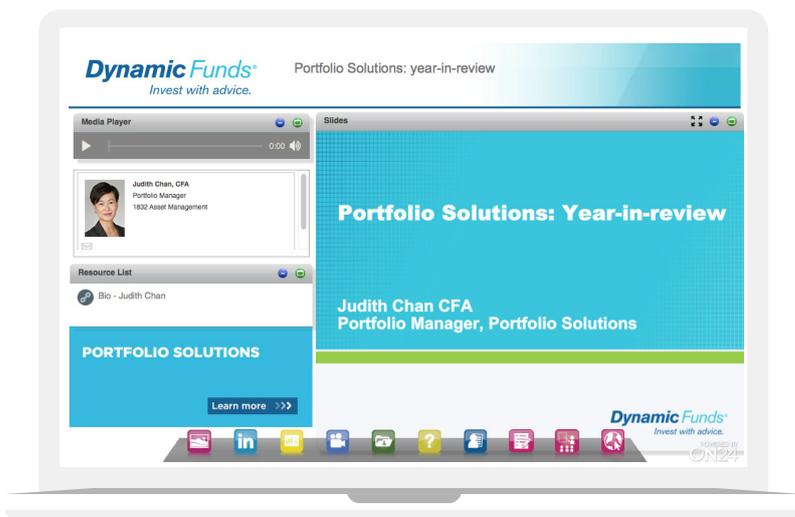


# WITH ON24, DYNAMIC FUNDS CRAFTS A FINANCIAL EDUCATION MACHINE



160K +

Continuing education credits issued



900

On-demand views per webinar



15

Average marketing-qualified leads created per webinar

## ABOUT DYNAMIC FUNDS

**Name:** Dynamic Funds

**Headquarters:** Toronto, Ontario, Canada

**Founded:** 1957

**Employees:** 500 - 1,000

**Funding:** Private

**Industry:** Investment Management

Founded in 1957, Dynamic Funds got its start as a small investment club in Montreal, Quebec. The group has since grown into one of the most recognized asset management firms in Canada and beyond. Dynamic Funds offers a comprehensive range of products and services spanning every primary sector, geographic region, and investment discipline. Its financial solutions include open and closed-end investment funds, fee-based, tax-advantaged and customized high-net-worth programs.

## INTRODUCTION

Dynamic Funds, one of Canada's most recognized investment asset firms, has a reputation to uphold. To back up its motto, "Invest with Advice," the company must establish trust with financial advisors. This means proving and providing expertise, so the firm produces a range of educational content, continuing education certificates and thought leadership material for its audience.

Traditionally, Dynamic Funds relied on in-person events as a way to connect and educate financial advisors on industry and portfolio updates. By leading with education and positioning themselves as the go-to industry resource, Dynamic Funds assumed visiting financial advisors would, over time, increase the amount of business done with the firm's portfolio managers. Its theory was well-reasoned, but it'd require an extra digital element to make its content connect with visitors from across the continent.

## THE CHALLENGE

Dynamic Funds' in-person events were successful, but only just so. For the company, the events struggled to scale its message affordably and to

demonstrate the firm's value. Venue costs and travel expenses added up. Financial advisor attendance declined and quality face-to-face time deteriorated. Dynamic Funds reassessed its strategy and decided its physical events needed a digital addition.

The investment asset firm needed a solution capable of scaling with its ambitions. The solution needed to educate financial advisors at a moment's notice. Additionally, any solution needed to record what content a visiting financial advisor has and hasn't seen, what they've asked of the firm before, and, finally, measure the visitor's interest in Dynamic Funds overall.

## THE ON24 SOLUTION

Dynamic Funds turned to the ON24 Engagement Platform to drive financial advisor interest in its digitized content. The firm curated webinar content based on industry topics ranging from planning foundations to privacy practices. It also provided events on insider subjects — all topics their financial advisors craved.

Dynamic Funds called its newly-founded content center "The Education Zone." The Education Zone provided financial advisors with direct access to an extensive curriculum in a single, easy-to-access location. Initially worried its audience would resist change from in-person events to digital events, Dynamic Funds saw financial advisors quickly adapt to the new learning format — giving it high marks for convenience.

With its educational content in place, Dynamic Funds shifted its focus to positioning its portfolio managers as industry thought leaders. This was great news for visiting financial advisors thanks to Dynamic Funds' easy-to-access events. It also meant visitors had easy one-to-one communication with the firm's portfolio managers. Dynamic Funds' expertise was suddenly available to its audience on their time and accommodating of their schedules.

Finally, Dynamic Funds, with ON24, set its platform up to issue continuing education credits. Every financial advisor needs a certain amount of credits to keep their designation. It was easy for the firm to offer CE credits during their webinars using ON24's automated testing and credit-issuing functionalities.



"ON24 has been key to taking our educational webcast program to the next level, helping us scale up and ultimately impress our clients."

**YASMINKA MARCUS**

**SR. MANAGER**

**EDITORIAL AND EDUCATIONAL PROGRAMS**

## RESULTS

Since adopting the ON24 Engagement Platform, Dynamic Funds has reinforced its position as an industry leader for financial advisors, cemented a digital strategy to supplement and build on their in-person events and:

- **Created consistent pipeline** - The Education Zone is the biggest lead generator for Dynamic Funds and the second-highest driver for website traffic.
- **Cemented itself as a continuing education resource** - Since launching the Education Zone, Dynamic Funds has hosted more than 200 webinars and issued more than 160,000 CE credits to financial advisors.
- **Improved insights for sales outreach** - Using advanced analytics from ON24, Dynamic Funds can easily address interests and concerns visiting financial advisors have — generating an average 10–20 "hot leads," per event. Armed with this information, Dynamic Funds' sales teams can grow portfolios, accounts, and relationships.
- **Made on-demand content must-have content** - Most financial advisors watch Dynamic Funds content on demand, rather than live. This means older, relevant content can enjoy longer lifespans while still providing financial advisors with richer experiences. In fact, Dynamic Funds averages more than 900 on-demand views per webinar.