The Story Behind the Success

"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

RAYMOND JAMES®

Company Name
Raymond James

About Raymond James
Founded in 1962 and a public company since 1983, Raymond James is a diversified financial services holding company that takes a comprehensive, client-focused approach to serving client accounts through 7,500 financial advisors in the United States, Canada and overseas. The company has expanded through the years to serve corporations, institutions and municipalities through significant capital markets, banking and asset management services.

Websites
www.raymondjames.com

SmartSource®

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 has evolved, there is a need for greater file security to protect proprietary data. In 2017, the company determined that they would need to gather the presentations from each speaker in advance and pre-load them onto Raymond James's computers. However, with only three internal meeting technology employees, the company did not have the additional staff required to manage this process.

Raymond James reached out to several presentation management companies, but most could only offer their own proprietary software that had to be loaded onto presenters' machines, which did not meet Raymond James's unique requirements.

Process

After a mediocre experience with a presentation management company they hired to help them with their 2017 national conference, Raymond James decided to reach out to SmartSource, whom they'd rented computer equipment from
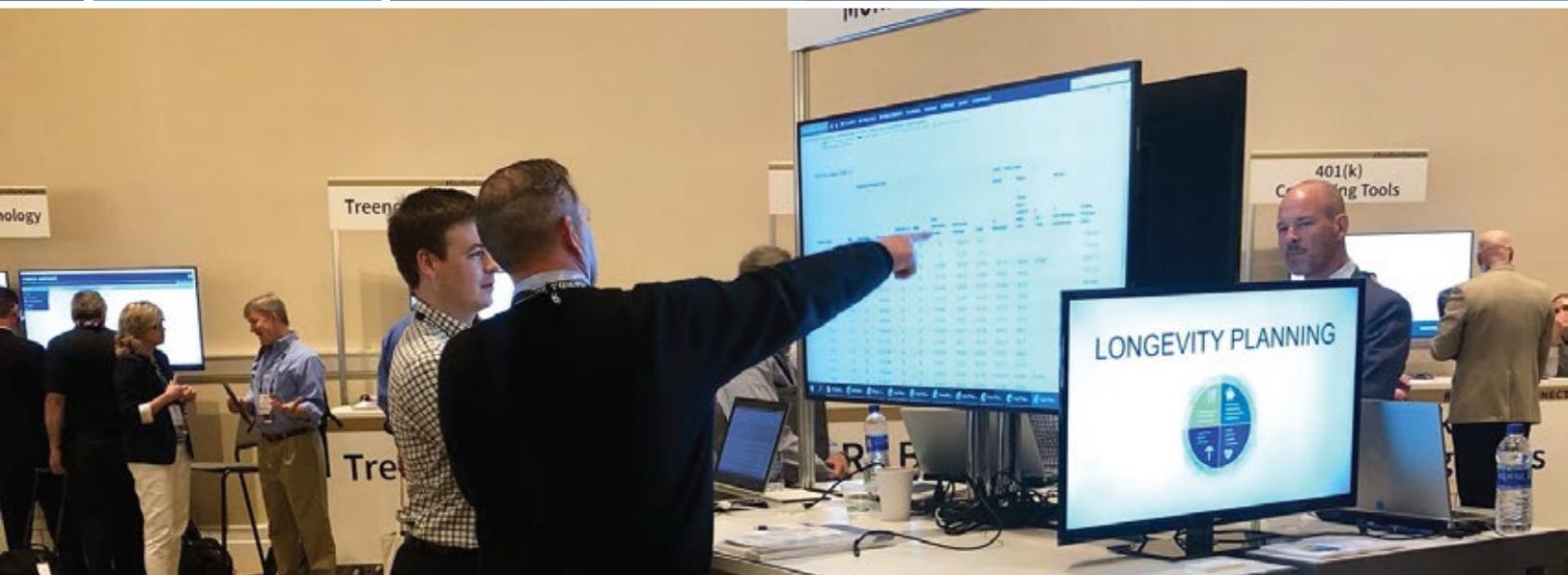
in the past. SmartSource was enlisted to collaborate with Raymond James at a smaller conference in December 2017 on a preliminary basis. The meeting went off without a hitch, and SmartSource was engaged to work on the upcoming ELEVATE national conference.

Together, the teams at SmartSource and Raymond James developed a customized solution wherein the company could utilize its own computers that are pre-configured for their software and environment and are not dependent on sometimes unreliable networking and WiFi.

Solution

At the 2018 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 experts at Smart-Source 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 2018 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've previously relied on the venue's on-site staff to handle.

SmartSource® is widely recognized for its breadth and depth of offerings and seamless systems integration for even the most complex temporary installations. By leveraging high performance IT, AV, and the latest interactive technologies, SmartSource's solutions help marketers effectively convey and distill their brand messages more effectively. SmartSource® is the trusted expert in technology solutions for businesses and events and maintains the largest national footprint in the computer and audio visual rental space.