



SUCCESS STORY: PROSPERA FINANCIAL SERVICES

Founded in 1982, Prospera Financial Services, member FINRA/SIPC and a registered investment advisory, offers the flexibility and resources only found at some of the nation's largest broker-dealers. Headquartered in Dallas, TX, Prospera was named Broker-Dealer of the Year by Investment Advisor Magazine in 2009, 2010, 2012, 2014, 2015, 2018, and 2019. The firm supports Independent Financial Advisors nationwide. For more information about Prospera, visit joinprospera.com.

LEARN HOW PROSPERA MASTERED EFFECTIVE TRAINING FOR A DISTRIBUTED CLIENT BASE.

Challenge

With a large, distributed client base of over 130 financial advisors (FAs) and a staff across 23 states, Jennifer Teager, who leads platform support and engagement for Prospera, has a considerable responsibility on her shoulders. She needs to ensure that all of these clients and their support staff are sufficiently trained on their internal software (called "COREngine"), which is their CRM and practice management tool built on Salesforce.com. She's also charged with supporting them from a one-on-one consulting standpoint. When onsite training in the client's location quickly proved to be too costly, Prospera needed an alternative solution.

Solution

Prospera selected LogMeIn's GoToMeeting and GoToWebinar to **help overcome their training and support challenges**. They are using GoToMeeting to host regular weekly Office Hours for focused training and community building, and it has been, "... invaluable to get support staff and sales assistants to learn how to do the stuff they needed to in COREngine," says Teager. They can **ensure superior audio quality** by instantly muting attendees' phone lines. All participants utilize the chat functionality to **easily communicate with other participants** and Teager. In addition, the integration with Calendly enables quick, effortless scheduling of one-on-one coaching sessions through instant dial-in information creation and set-up, which is then sent directly to the intended recipient.

GoToWebinar is their tool of choice for **more controlled training experiences**. The team uses the webinar software for monthly sales training and quarterly state-of-the-union

calls for Prospera. The platform enables Teager to decide who sees what, and where they see it.

Prospera also brought on GoToMyPC for their **emergency access needs**. Prospera's SmartStation software, used for processing trades and staying up-to-date on client accounts, is typically loaded on office-based desktop computers, which requires token access and creating a VPN to connect to. When advisors are traveling or at home due to less-than-ideal weather conditions, GoToMyPC helps them access their SmartStation software from wherever they are.

Results

Implementing GoToMeeting has empowered Prospera in ways they had never thought possible. It has reduced the need for **Teager to go onsite at client locations for training, a major cost and time savings**. By using the platform to hold weekly Office Hours, Teager says it provides advisors with, "... a sense of community and interaction, and it's deepening our relationship tremendously" – an unexpected but warmly welcomed benefit. It has also helped **bridge the technology learning gap** for the typically older, less technologically savvy financial advisors by permitting Teager to access their systems to provide a live, step-by-step guide through the software. These are just a few of the myriad of reasons why Prospera says they're dedicated to GoToMeeting. "I looked at some of the other meeting solutions, and they just don't have the same feel and don't have some of the features we need since we have such specific use cases," Teager happily confessed.



"I looked at some of the other meeting solutions, and they just don't have the same feel as GoToMeeting and don't have some of the features we need since we have such specific use cases."

- Jennifer Teager, Platform Support & Engagement, Prospera Financial Services

Enabling a large, distributed workforce is a real challenge for many organizations.

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