



*By using an appropriate WebEx product, TIAA-CREF Institute has been able to further leverage our cutting-edge research and educational programs by reaching a wider audience than in the past. The use of WebEx technology has provided the Institute with another medium to conveniently communicate with our client audiences, in a manner they greatly appreciate and enjoy.*

— Anne Ollen, TIAA-CREF Institute Director of Education

## TIAA-CREF expands its client base with successful online seminars.



### INDUSTRY

Non-profit Financial Services

### WEBEX APPLICATIONS

Event Center

### SUMMARY

TIAA-CREF chose WebEx to help expand an already-popular professional development seminar series. They now reach more clients and prospective clients, and collect valuable feedback to improve seminar quality.

### ABOUT TIAA-CREF INSTITUTE

#### Line of Business

Independent Research and Education

#### Headquarters

New York, New York

#### Number of Employees

Approximately 3,300

#### WebEx Customer Since 2002

Formed in 1998, TIAA-CREF Institute is a research and educational arm of TIAA-CREF, the non-profit pension fund giant. The Institute's mission is to broaden and strengthen TIAA-CREF's longstanding leadership role in supporting lifelong financial security for individuals and their families. The Institute facilitates the exchange of ideas and expertise among leading educators, institutional decision-makers, financial advisors, researchers and policymakers. The Institute's fields of research and education currently include pension and retirement issues, health, life and long-term care insurance, investment products and strategies, endowments and planned giving, higher education, corporate governance, and financial literacy and education.

### The Challenge

TIAA-CREF Institute conducted professional development seminars for Benefits and Human Resources Plan Administrators from universities, colleges, associations, hospitals, schools and other non-profit organizations. Program attendees saw value in these free seminars as they provided access to expertise and information to meet educational and professional development needs. By attending Institute programs, TIAA-CREF clients learned about strategic issues pertaining to the administration of employer pension plans and/or employer health and welfare benefit plans. The courses included information about changing trends in benefits and human resources, relevant legislation, regulation and compliance issues. These sessions consistently help TIAA-CREF's core clients maintain currency with issues, and even achieve continuing

education credits for maintaining two popular industry professional designations. The Institute's in-person seminar programs typically lasted for two days and attendees convened in New York City or other selected locations. The TIAA-CREF Institute provided the program, materials, venue and meals as part of these programs. These seminars also offered crucial networking opportunities among participants, and for area sales and relationship managers who work in an increasingly competitive business environment.

TIAA-CREF Institute's in-person programs, seminars and forums were, and continue to be, greatly appreciated by its constituents; however, given the competitive market climate, the Institute sought to provide strategic information of interest to its audiences with greater regularity and in a cost-efficiency. The Institute wanted to supplement content delivered through its successful forums, programs and seminars in a way that would require less lead time than live programs. They also wanted to be responsive to client needs for training in light of limited travel budgets and time. In addition, they were seeking more resource-efficient ways to reach clients. The Institute concluded that the only way it could extend its reach was to implement a new program of web-based seminars using a one to two hour format that clients could attend in the convenience of their own offices. In Q3-2002, TIAA-CREF Institute evaluated several possible solutions for online events. Many competitive offerings could not work in the TIAA-CREF network and formidable firewalls. Other offerings required on-premise hardware,



complex server software, and technical staff to run such a solution. Then there was the problem of scalability, since TIAA-CREF's clients are distributed across the U.S. and abroad, with varying degrees of technological sophistication, and their organizations could potentially be using any type of computer system imaginable. The Institute wanted a solution that addressed all of these challenges and retained as much of the interactivity and quality of in-person events as possible, while offering simple access for attendees.

### The Solution

The Institute selected WebEx Event Center for its online events based on an evaluation of about 30 separate criteria. In particular, WebEx was able to perform very well with the Institute's installed computing and network infrastructure as well as that of its clients. Ease of use and an intuitive user experience were also important elements of the Institute's selection of WebEx. As a global communications service, no physical infrastructure or installation resources are required with WebEx, up front costs are negligible and the service is provisioned within a matter of days. During two pilot programs in Q4-2002, client feedback was very positive and strengthened the Institute's decision to move forward with WebEx for ongoing web conferences throughout 2003. According to Roslyn Allen, Educational Resources Consultant at TIAA-CREF Institute, "All in all, we had about 30 areas of comparison for each of the vendors we considered. WebEx's solution met all of our technical requirements quite well. WebEx's account managers took the time to work with us to address all of our criteria. They were and continue to be accessible to us whenever we need them. WebEx has been a great partner for us." In addition to using the WebEx global network for the actual

online events, the Institute opted to have WebEx's Production Services Team fully produce each event. With this service, WebEx supports the TIAA-CREF Institute's rehearsals, in-event technical facilitation, and post-event reporting. This external production support then allowed Institute staff to focus primarily on content creation and customer needs.

### The Benefits

Utilizing WebEx Event Center technology, TIAA-CREF Institute reaches 125 to 250 geographically dispersed institutions each month. They reach significantly more individuals than that since clients often invite colleagues and/or staff and participate in groups. Some online events have been so popular that the Institute had to offer a second session to meet demand. Based on their early success and efficiencies with WebEx, the Institute now offers more events and invites double the number of client institutions. The Institute believes its web conference initiative enhances client loyalty and may lead to additional business opportunities. Several members of the TIAA-CREF sales force have reported hearing positive feedback about the web conferences and feel that they are helpful in supporting their strategic goals in the field. According to Allen, "We are thinking of more and more ways to leverage web conferences. Our clients want more, and other areas of our company are expressing interest in the technology." Several WebEx features have enhanced the experience and ease of use both for the Institute and for Web conference attendees:

- The Institute takes advantage of the record and playback capabilities in WebEx to offer an online library of archived events that reach an expanded audience after each actual session. This has resulted in increased atten-

dance of approximately 15%-20%. All of the Institute's live web conferences are recorded and archived and made available through its "Knowledge On-Demand" online library.

- WebEx provides automated registration tools so the Institute can easily manage events. Attendees enjoy the fast and easy registration process. The Institute has found the WebEx back-end registration platform so robust that they now use WebEx online tools to manage some of their in-person event registration processes as well.
- The Institute always takes advantage of the WebEx polling features during the sessions to increase audience participation. They also customize evaluation forms at the end of the session to collect detailed feedback and to issue certificates of completion to program attendees.

## HIGHLIGHTS

- TIAA-CREF chose WebEx based on its strengths in 30 separate areas, and enthusiastic client feedback during two pilot programs.
- TIAA-CREF uses WebEx record and playback capabilities to archive all its events in an online library, increasing attendance by up to 20%.
- WebEx automated event registration tools are so popular with attendees, TIAA-CREF uses WebEx to manage in-person event registration.