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—Jackie Myers, Marketing and Education Coordinator

## Farin & Associates achieves critical mass of productivity gains with WebEx.



### INDUSTRY

Financial services

### WEBEX APPLICATIONS

WebEx Sales Center, Training Center, Event Center, Meeting Center, Support Center

### SUMMARY

WebEx provided Farin & Associates with an all-in-one solution for low-stress webinars, efficient customer support, and dynamic sales. Due to the reliability and intuitiveness of the WebEx platform, the firm can now offer more online education than ever before, demo products with unprecedented ease, and achieve much faster resolution of technical support issues without increasing the size of its 26-person staff.

### ABOUT FARIN

- **Line of Business**  
Financial services consulting and software
- **Headquarters**  
Fitchburg, WI
- **Number of Employees**  
26
- **Target Market**  
Banks, thrifts, and credit unions nationwide
- **WebEx Customer Since 2005**

Founded in 1985, Farin & Associates is a consulting firm that provides asset management and retail pricing solutions for the financial services industry. The firm assists banks and credit unions by developing, selling, and supporting software and by offering fully accredited webinars for continuing education.

### The Challenge

Farin & Associates has provided online training for nearly a decade. Yet despite the firm's deep experience in webinars, the planning and execution of large online events with Microsoft Live Meeting proved a consistently stressful experience. "Each training session used to be a fairly chaotic event here in the office," recalls Jackie Myers, Marketing and Education Coordinator at Farin & Associates. "Just coordinating registration and ensuring that everyone could connect to the meeting was such a hassle." When Live Meeting raised its prices, Farin & Associates began considering alternatives that would offer more value—not only in terms of affordability, but also in terms of making webinars easier for the firm and more compelling for attendees.

### The Solution

WebEx offered solutions far beyond online training, and that was the key to its appeal. Myers immediately saw the potential for WebEx to provide an all-in-one solution for low-stress webinars, efficient customer support, and more dynamic sales. "The range of services available through WebEx was really attractive, because we could use it to maximize what we do in every department," Myers explains. "We only have 26 employees, so WebEx offered an excellent way for us to expand our offerings without adding staff."

Farin & Associates now uses WebEx Training Center to provide all of its online education. 30 percent of the firm's training is for existing customers at no cost, helping clients stay on track with new upgrades and industry trends. The rest of the firm's webinars offer industry-certified training for a fee. By integrating with Learning Manager by GeoLearning, WebEx Training Center can handle all registration and store course materials for each webinar. WebEx Network-Based Recording enables Farin & Associates to record all sessions and offer those recordings to anyone who misses a class. WebEx Training Center also makes it possible for the firm to track webinar participation quickly and easily. "Education credits are only given to people who actively participate in a session," explains Myers. "So it's very important for us to track participation without bending over backwards. And with WebEx, I can go right in, pull up a report, and immediately see which attendees participated. It's just so much easier than it was before."

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—Jackie Myers, Marketing and Education Coordinator



In addition to providing enhanced capabilities for dynamic online education, WebEx helps the firm's sales associates deliver superior follow-through with WebEx Sales Center and Meeting Center. Farin & Associates now handles all demos through WebEx, and associates can use the document portals in WebEx Sales Center to provide relevant product information to each client. "When we get a sales call from a prospective customer, we can use Meeting Center to demo our product within five minutes," says Myers. "Obviously, our sales team is really thrilled that they can offer such a high level of response."

WebEx also enables the firm's IT department to respond more efficiently to an estimated 1,500 support tickets every quarter. Roughly one-third of those tickets result in a WebEx session, and the reliable connectivity and screen-sharing capability of WebEx Support Center helps ensure quick resolution of technical issues. "Our IT staff can now diagnose problems much more quickly," says Myers. "WebEx just seemed to provide the answer we needed in every department."

### The Benefits

For Farin & Associates, the days of chaotic training sessions are simply over. "Now that we have WebEx Training Center, holding a webinar with 50 attendees is just another day at the office," Myers says. "It's become a stress-free experience for us and for the attendees, because WebEx is so intuitive and reliable." She already has plans to increase the firm's course offerings by 20 percent in 2008, which means more revenue for the firm. And because WebEx handles all course registration, Myers estimates that she now has 20 more hours per month to devote to other, less administrative tasks.

WebEx Support Center helps the IT staff at Farin & Associates save time and increase customer satisfaction by providing almost immediate entry onto users' screens. Meanwhile, Meeting Center and WebEx Sales Center have vastly simplified the demo process for sales associates. "WebEx has really helped us achieve a critical mass of productivity gains," Myers notes. "It's being used in four different departments in this very small company, and it's helping us save money and save time. We can offer more educational opportunities. We can provide effective remote support. We can communicate with prospective clients in more ways than ever before. It absolutely gives us a competitive edge."

Myers credits all of these gains in productivity to the ease of use she and others find in WebEx. "Once anyone—whether a customer or an employee—uses this technology a single time, they want to use it more," she says. "And that makes WebEx an invaluable partner for us."

### The Future

For Farin & Associates, partnering with WebEx is a key to further innovation across the organization. For instance, the firm plans to use WebEx recording capabilities to create and save sales demos. Those demos can then be turned into podcasts and posted on the company's website or in WebEx Sales Center document portals. "We keep discovering new ways to use this technology, or reinventing old ways," says Myers. "WebEx makes that kind of evolution possible."

## HIGHLIGHTS

- WebEx provides Farin & Associates with an all-in-one solution for low-stress webinars, efficient customer support, and more dynamic sales.
- WebEx enables Farin & Associates to offer webinars more frequently than before, w/wgenerating greater revenue for the firm.
- WebEx makes it possible for the firm's sales associates to deliver high-impact demos without hassle or delay.