



## Exane Derivatives

[www.exane.com](http://www.exane.com)

### Industry

Financial services

### Challenges

- Provide analysts and consultants with a cost-effective way to more frequently engage clients and strengthen relationships
- Enable reliable, simple access to online content
- Accelerate the distribution of important product and service information

### Solution

- Adobe Connect for Web Meetings
- Exane Derivatives is using Adobe Connect as a virtual collaboration platform that enables analysts and consultants to engage clients on an ongoing basis in interactive, dynamic online presentations, accelerating the delivery of important information and solidifying existing relationships.

### Results

- Enabled cost-effective meetings with clients without adding travel-related costs or concerns
- Provided reliable, seamless access to interactive online presentations to disparate users
- Improved consultants' ability to inform customers of new or modified services and products
- Strengthened client relationships with more frequent contact

### Systems at a glance

- Adobe Connect
- Adobe Captivate®

# Exane Derivatives

Leading French financial services firm uses Adobe® Connect™ to accelerate the delivery of important information, keeping customers more informed and providing superior services

## A more direct connection with clients

Exane Derivatives, part of Groupe Exane and a preferred partner of BNP Paribas, has more than 1,200 institutional clients worldwide. Serving so many clients can be challenging, and the company sought new ways to improve how it communicates with clients and how services can be enhanced to improve satisfaction.

To address these concerns, the firm deployed Adobe Connect, an enterprise web conferencing solution, to improve its ability to inform and communicate with its clients. The solution offers an innovative platform for making Exane's business processes more dynamic and for improving customer satisfaction.

"We have set up an online conference system that makes it possible for us to increase the number of appointments with our clients throughout the year and keep them better informed about our products and services," says Jean-Benoît Goulabert, director of sales systems contracting for Exane's Derivatives division.

## More communication, more frequently

Traditionally, Exane's associates have met with their clients, particularly those abroad, twice a year at meetings that bring together vendors and analysts. "We wanted to enhance our services, distinguish ourselves to ensure client satisfaction and loyalty, and find a way to increase contacts throughout the year between in-person meetings," Goulabert adds.

According to Goulabert, getting information to clients more quickly would help improve satisfaction and strengthen the relationships between the Exane teams and clients. After extensive research about potential solutions, Exane selected Adobe Connect to provide rich, real-time interactions with customers online.

"Because many of our clients generally work on the trading floor, which has strict security parameters, we needed an easily accessible system that didn't require any software to be installed on a user's workstation," says Goulabert. "In addition, our analysts needed to be able to create an engaging, interactive environment—including presentations and other documents—that brings a dynamic element to meetings and makes them more effective."

With Adobe Connect, creating impactful, interactive online meetings is intuitive and simple. "The Adobe solution makes it easy to create meeting templates, set your own parameters, manage the participant list, resize the modules to fit the screen, or pull up documents in Microsoft PowerPoint and Adobe PDF," says Goulabert. "It's also easier to deploy because there are no plug-ins required. All we have to do is e-mail an invitation to our clients to participate in the session."

## Smooth roll out and implementation

Prior to deploying Adobe Connect, Exane performed client beta testing to check video and audio quality, determine training needs, and plan the necessary steps to make it easy for Exane's associates and their clients to adopt the solution.

"Adobe provided a rather detailed API, so we were confident in the integration of Adobe Connect with our CRM," Goulabert says. "Today, we can determine the participant list for meetings, create Adobe profiles for clients without one, and format an invitation to simplify logging on. Meanwhile, our analysts can create an online conference, select the clients from their contact list, and send them an invitation using a prepared e-mail message they can personalize."

*"We now have a conferencing system that enables us to better inform our clients of changes in our product and service offerings and to strengthen our personal relationships. This new collaboration tool is an asset that helps us to stand out from the competition."*

Jean-Benoît Goulabert  
Director of sales systems contracting,  
Exane Derivatives

For Exane, it was essential that the online conference experience be as simple as possible for clients. "We integrated a connection that enables us to diagnose the client's computer and check the configuration to be sure that the meeting will go smoothly," Goulabert says. "We also developed two two-hour training modules and created a tutorial with Adobe Captivate to guide the user through his first steps with Adobe Connect."

### **Spreading the word about Adobe Connect**

Today, Exane's meeting rooms are equipped with Adobe Connect, two screens, and a central unit for the connection. Cameras enable the client to see the Exane analysts and advisors, making the interaction and the relationship livelier. "The result is very positive. The teams have completely adapted to the solution and use it entirely on their own," says Goulabert. "We now have a conferencing system that enables us to better inform our clients of changes in our product and service offerings and to strengthen our personal relationships. This new collaboration tool is an asset that helps us to stand out from the competition."

Though Adobe Connect is currently used for organizing group presentations that bring together up to 15 clients at a time, Goulabert acknowledges that the company's current use is only a small portion of what is possible. Because of the success the Derivatives division has had in expanding and improving its services with Adobe Connect, other departments in the group have also made it their platform of choice. "The project's success has convinced two more departments to purchase Adobe Connect, and it will soon be integrated as a complementary tool for consolidating their customer relations and business approach," Goulabert says. "We hope all other departments will have the same levels of success with the Adobe solution as we've had."

#### **For more information**

[www.adobe.com/products/  
adobeconnect.html](http://www.adobe.com/products/adobeconnect.html)

[www.adobe.com/financial](http://www.adobe.com/financial)



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