

BMO Financial Group

# Personalized banking services

Financial services group uses Adobe® Connect™ to deliver a high-touch customer experience

**Bank of Montreal Financial Group**

Toronto, Ontario, Canada  
[www.bankofmontreal.com](http://www.bankofmontreal.com)

Toronto, Ontario is headquarters for the BMO Financial Group (BMO), which serves more than 11 million personal, commercial, corporate, and institutional customers in North America and internationally. BMO is the choice for corporate card services for manufacturers, large-scale retailers, engineering firms, government agencies, and other Fortune 500 and Fortune 1000 firms because of its financial stability, top-tier financial products, and award-winning customer service.

A major component of the firm's exceptional service is its commitment to personalized interactions. Using Adobe Connect, BMO can engage with customers, no matter which city, province, or country they are located. "Adobe Connect was a strategic addition to services and our ability to increase the frequency and quality of our engagements with customers," says Ted Schneider, senior manager of e-solutions services at BMO. "We have the flexibility to host meetings and sales presentations, and handle customer inquiries online—delivering a higher touch customer experience."

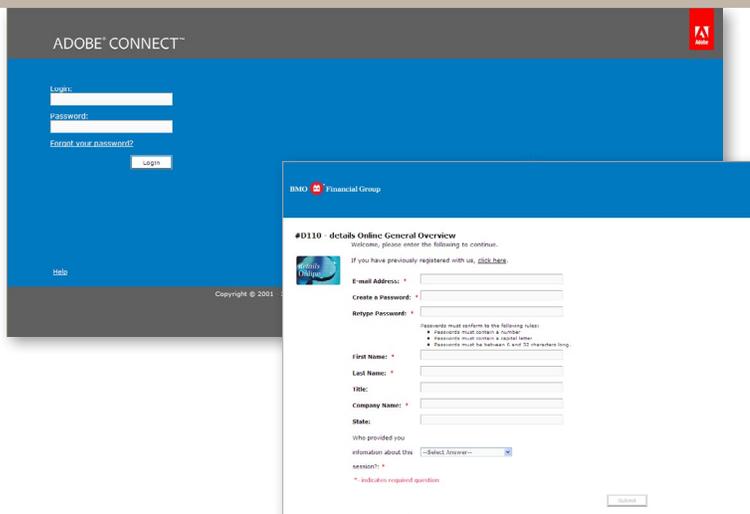
## The costs of doing business

The amount of time it takes maintaining ongoing, productive customer relationships can be exceedingly high. Meetings with clients to review their financial situation and to educate them on new products and services requires a personal touch, taking employees out of the office and away from their daily job duties for days at a time.

Previously, commercial service managers had to make tough decisions in determining when and where to send sales reps and account consultants. "All of our clients are very important to us, so it is critical we manage our personnel productivity and resources to best meet our clients' needs," Schneider says. "Adobe Connect helps us reach more people, more often, and with richer content. It's like being everywhere at once."

Adobe Connect helps streamline the bank's resource management, increasing the number of customer meetings sales and customer account reps can conduct while improving productivity and managing time more effectively. Meeting organizers create customer-specific content for meetings by pulling in existing content from Microsoft PowerPoint and other applications, and use the solution's persistent meeting rooms to store news and notes from previous meetings instead of re-creating a new meeting each time.

Adobe Connect helps Bank of Montreal Financial Group extend the reach of its customer education programs by delivering customized, dynamic content to participants in any location, at any time. With Adobe Connect, training modules are easily modified, and can be delivered live or on-demand from previous recordings for optimal convenience and efficiency.



*“Adobe Connect was a strategic addition to services and our ability to increase the frequency and quality of our engagements with customers. We have the flexibility to host meetings and seminars, give sales presentations, and handle customer inquiries online—without having to leave the office.”*

**Ted Schneider**  
Senior manager of e-solutions services,  
Bank of Montreal Financial Group

### Challenge

- Increasing the frequency and quality of customer meetings and training for employees and customers
- Streamlining content development for faster, more efficient delivery
- Improving employee productivity while increasing the number of customer interactions

### Solution

- Deliver live and on-demand customer sessions accessible on virtually any computer
- Employ creative assets for a more interactive meeting and learning experience
- Enable reliable, easy access lively, dynamic online meetings and webinars for hundreds of participants

### Benefits

- Delivered approximately 75% of more than 250 annual events online, expanding customer reach
- Enabled reliable access to online content to reach as many as 200 participants simultaneously with live and on-demand webinars and web meetings
- Saved an average of \$1,200 in travel expenses per employee per trip, with additional online meetings to supplement customer visits
- Improved client relationships with an increase in customer interactions
- Enabled instant feedback regarding instructor performance and content relevance to accelerate content modification and development
- Accelerated meeting preparation time with availability of persistent meeting rooms

“We can have a meeting up and running in a matter of minutes, using persistent meeting rooms, saving a lot of preparation time and increasing the number of meetings we can conduct,” Schneider says.

The firm chose Adobe Connect for its wide-ranging capabilities, flexibility, and ease of use for employees and customers alike. Unlike other solutions, Adobe Connect leverages the free and ubiquitous Adobe Flash® Player instead of additional software downloads to enable reliable, seamless access to dynamic content such as video, audio, and richly featured presentations for an engaging and interactive experience.

“Interactivity is an underrated, yet vital aspect to effective communications—whether it’s for internal meetings with sales and customer service employees or with customers themselves,” Schneider says.

“Adobe Connect affords us the capability of interacting in a lively, real-time environment that replicates a face-to-face experience regardless of distance and location for more productive meetings.”

### Raising the bar

While Adobe Connect is instrumental in making meetings more efficient and cost effective, it has an even more dramatic impact on the online events the bank hosts for its customers. With reliable and seamless access to webinars via Adobe Connect, the bank has an efficient, cost-effective means for engaging customers in a valuable and impactful manner.

The Adobe solution helps the firm provide customers with educational webinars covering an array of topics. Sessions are recorded and made available for playback from virtually any desktop or device to registered customers who may have missed a live session or simply need ongoing refresher training.

The weekly webinars address hot topics relevant to BMO—from information about their corporate card program to streamlining billing reconciliation. In the past, BMO would likely have needed to outsource content creation because of the customization required, and could significantly delay the training process.

“In the past year, nearly 75% of our 250 meetings and events were done using Adobe Connect and reached hundreds of participants, expanding our ability to reach more customers, more effectively,” said Schneider.

With Adobe Connect, the bank can instantly deploy informational content it creates in house using Adobe Flash, Adobe Captivate®, and Adobe Presenter that are customized to the unique needs of a customer, employee, or general topic of interest. “Adobe solutions save us a lot of time and money in facilitating training,” Schneider says. “We can create rich, interactive, and dynamic content without having to be software experts. We’re able to continuously adapt the content to the changing demands of our customers and employees and ensure they have all the information they need, when they need it.”

Bank of Montreal Financial Group account advisors can host online meetings and webinars with clients to save time and money, while strengthening customer relationships. With Adobe Connect, staff can pull in engaging presentations, audio, video, or other interactive elements that replicate an in-person experience from virtually any computer or device.



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**Ted Schneider**  
Senior manager of e-solutions services,  
Bank of Montreal Financial Group

#### Toolkit

Adobe Connect for Webinars  
Adobe Connect for Web meetings  
Adobe Captivate  
Adobe Presenter

The firm takes feedback from its participants seriously. Using the rich functionality of Adobe Connect, it employs real-time surveys regarding content and presenter efficacy at the end of each session and uses the information to modify content or develop new programs accordingly. "Using all the features of Adobe Connect helps us stay close to our customers and employees," Schneider says. "The ability to collect empirical feedback and apply it directly to our information programs is a valuable asset that we haven't had in the past. It helps us provide a high-touch, personalized experience to strengthen relationships and ensure that they remain prosperous."

Schneider recognizes that Adobe Connect and other Adobe solutions are helping to revitalize and transform the way BMO engages with its customers and employees. "Customer relationships, employee productivity and business efficiencies are our primary goals," he says. "The real value of Adobe Connect is that it marries these goals and enables us to deliver a higher level of service to customers and employees that simply isn't possible with other solutions."

#### For more information

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



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