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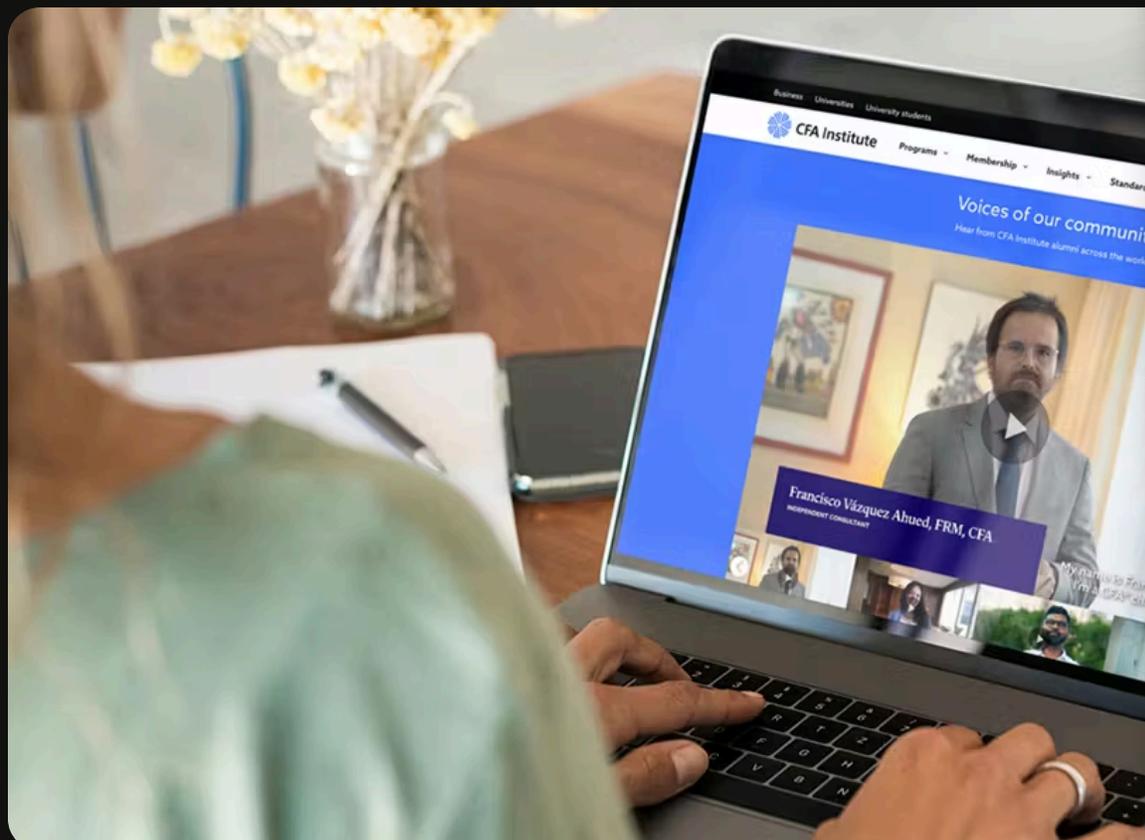
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HOW CFA INSTITUTE MORE THAN TRIPLED ENGAGEMENT

📅 Dec 6, 2024



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LOCALIZED VIDEO MARKETING CAMPAIGN BOOSTS GLOBAL AWARENESS



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CFA Institute is the world’s premier association of investment management professionals. This non-profit, membership organization is the official administrator of the Chartered Financial Analyst® Program. In order to be awarded the CFA charter, one of the most recognized and respected financial designations, candidates must pass a series of three exams, complete a work experience requirement, and annually attest to adherence to professional conduct guidelines. It’s also one of the hardest financial designations to receive—typically, only about one-fifth of program candidates earn the CFA designation.

Historically, CFA Institute dedicated its marketing resources toward current and future members, deriving its revenue primarily from membership and exam fees. Past CFA Institute marketing communications, such as emails, direct mailings, and printed materials, focused on providing educational content for members. However, a shift in marketing strategy led the organization to develop a broader approach to increase awareness of its mission and promote the highest standards of ethics, education, and professional excellence in the investment industry for the betterment of society.

CFA Institute turned to Brightcove to help achieve these new marketing goals. As its core marketing tool, the organization hoped to target not just existing CFA members and candidates, but also institutional and individual investors, all in the pursuit of higher standards within the investment industry.

“The idea was to build awareness of the organization’s high standards and how CFA Institute and its members both embody these values and help deliver important services to membership and the broader society,” says Mitchell Forst, CFA Institute general manager. “By calling on the investment industry as a whole to measure up to these standards, we can build greater trust and market integrity, which will benefit all of us.”

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We've learned a lot about engagement. It's definitely higher than it was five years ago, and we attribute that to the better content we've been able to create using Brightcove. Brightcove has all the tools we need, and it's a great choice for any size organization, large or small.

MITCHELL FORST

CFA INSTITUTE GLOBAL VIDEO PRODUCTION MANAGER

To transform its overall marketing strategy, CFA Institute collaborated with us to create better, more broadly-targeted brand awareness video campaigns. And we've continued producing educational video content for its membership base. CFA Institute decided to allocate a majority of its video spend toward worldwide thought leadership.

CFA Institute debuted its most extensive video awareness campaign, "Learn More About Us," a multi-million dollar, multi-year initiative to raise awareness among financial professionals. Hosted on, and distributed through, Brightcove's Video Marketing Suite, we analyzed and profiled some of the organization's charterholders who have "measured up" and gone beyond. The campaign ran in all 73 CFA Institute markets in which charterholders are active, including Europe, Africa, the Middle East, Asia Pacific, and the Americas. Through our global delivery platform, campaign producers were able to track engagement and reach from around the world. After seeing upticks in viewership in the Asia-Pacific and Latin American regions, the CFA Institute video team coordinated with those local offices to create specific campaigns, complete with subtitles and culturally relevant content.

"One of the things we really appreciate about Brightcove is its ability to help us understand what's watching, where people are dropping off, and what works better in certain markets."

Since the organization's introduction of localized video marketing, there's been significant growth in interest from the Asia-Pacific and Latin American regions. One of our clients says, is video: "Video has played a big part of the growing interest in the region, especially among the younger, more tech-savvy demographic. They're more likely to watch video content on their mobile devices, and they're more likely to engage with it."

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and awareness.” Currently, CFA Institute is working to create a presence in each of its regional markets, using Brightcove to support content

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CFA INSTITUTE TRIPLES ENGAGEMENT SCORE USING BRIGHTCOVE ANALYTICS

Among Brightcove’s capabilities, its analytics functionality and analytics API have proven most significant for CFA Institute. With analytics providing Forst and his video team precise data to measure video marketing efforts, they’ve developed a far better understanding of what aspects of video drive results. For instance, they’ve learned to keep a close eye on drop-off rates to determine ideal video lengths. And they’ve been able to identify key engagement-driving factors.

“We’ve learned to target our email and video campaigns toward different times of the day,” says Forst. “We’ve also been able to make much more informed decisions about the types of video our audience will be receptive to, with respect to length and format. That was a big learning for us.”

One example that showcases Brightcove analytics’ tremendous value is in the video [What to Expect on Exam Day](#). Part of the organization’s exam preparation content, the video explains what candidates need to bring and what they shouldn’t forget on exam day. It was the first opportunity for CFA Institute to put the full extent of Brightcove to work, and, according to Forst, results proved just how critical the analytical data was to the production process.

“Our first attempt at the video was disappointing. The analytics showed it wasn’t engaging, and people dropped off because it wasn’t engaging.”

But the analytics also uncovered that the video attracted increased views during the run up to exams. Considering these factors, Forst and his team went back to the drawing board and recreated a far more effective version of the same video. They featured a professional actress and shortened it. They also decided to release it twice over two days, to maximize peak watching periods. “It turned out a lot better,” Forst says. “It’s now one of our most popular videos.”

In 2017, “What To Expect on Exam Day” drew 53,000 views and a 71 engagement score, more than three times its previous score of 20. And out of 4,000+ CFA Institute

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ANNUAL CONFERENCE DRAWINGS AND SOCIAL MEDIA VIEWS

CFA Institute also employs live stream video and social media marketing to increase views and engagement. For large-scale events, such as internal meetings, conferences, and outreach programs, the organization delivers live stream footage to its Brightcove Gallery Live page, giving off-site participants the chance to watch from their personal computers and mobile devices. Using Brightcove Social, CFA Institute posts the live content simultaneously to its Twitter, Weibo, and LinkedIn accounts. And after any live event, footage is cut down to smaller VOD clips, which are then posted to the group’s very active social network. Among its growing number of live stream video events, the organization’s annual conference and Research Challenge rank as most popular. Last year’s Research Challenge attracted 1.2 million views across all distribution channels, while 2017’s annual conference drew 1.5 million from live and VOD content combined.

Thanks to Brightcove Social, Forst says video distribution has become much easier, which he believes has impacted audience reach: “Through the social tool, we can upload clips rapidly. It also allows people in the organization to self-serve and find content, which saves us a lot of time and expense. I think we’re reaching new viewers and making those clips available faster to audiences on social media.”

He continues: “We’ve learned a lot about engagement. It’s definitely higher than a year ago, and we attribute that to the better content we’ve been able to create. Brightcove has all the tools we need, and it’s a great choice for any size of organization, big or small.”

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Core

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Manage Video Library

Player

Platform

Brightcove

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- OTT

- Accessibility
- Security
- Content Monetization
- Integrations
- Social Integrations

Solutions

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- Media Studio
- Marketing Studio
- Beacon Studio
- Zencoder

Resources

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- Customer Stories
- Integrations Hub
- CAE Calculator

Learning

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- Brightcove Community
- Product Documentation
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