



case study

'It's Much More Interactive': How Complyport Uses Zoom for Targeted Marketing and Customer Acquisition

As the global economy becomes more complex, so does financial regulation, and Complyport has built its success on helping international companies meet regulatory requirements and navigate finance law. Established in 2001, UK-based Complyport assists financial services companies with compliance and regulatory services, including project and change management, ongoing compliance support, [Financial Conduct Authority \(FCA\) authorisations](#), and much more. Complyport also offers its clients a digital toolkit through its online compliance solution called Portal, which gives clients access to Complyport's Core and Special Services applications.

With offices in Asia and Europe, a presence in the U.S. and the Middle East, Complyport helps its global clients adopt compliance frameworks across a wide range of financial services firms.

Challenge

Although Complyport serves a wide range of clients across a number of financial services sectors, regulatory compliance is a niche market, and Complyport requires an effective means of targeting and reaching its customer base. Complyport relied on email to support its marketing efforts and reach new clients. However, the company wasn't getting the traction it needed from its email marketing campaigns.

"Historically, our marketing was very much based around sending out emails and seeing what came back," said Jonathan Greenstein, Business Development Manager at Complyport. "And these marketing emails had a marginal degree of impact. We needed to get people to come to us as opposed to us having to go pitch them every time."

Complyport also needed a way to demo its suite of apps and services to its customers, which was difficult with such a globally dispersed client base. Without the ability to clearly and easily demonstrate its



COMPLYPORT
COMPLIANCE LEADERSHIP

Complyport

Founded: 2001

Headquarters: London, England

Industry: Financial services

Challenges: Sprawling marketing efforts, demonstrating industry expertise to global clients

Solution: Zoom Webinars, Zoom Meetings

Business Benefits: More targeted marketing, increased client reach, ability to demonstrate app suite and company value to global clients

"Once we started using Zoom for webinars, we saw the meeting facilities and decided to use it for demonstrating our online regulatory technology tool. For people who are not based in London or don't have the time to meet us, we'll set up a Zoom Meeting and get them online to have a look at all the different tools and our suite of apps."

– Jonathan Greenstein
Business Development Manager,
Complyport

value, Complyport's sales team did not have the tools it needed to drive sales and employee success.

Solution

The teams at Complyport decided to target marketing efforts by hosting free webinars on different financial regulation topics.

Greenstein had a webinar solution in a previous position, but the significant cost made it impractical for Complyport to adopt. However, when Greenstein found Zoom, he realised that he could get better webinar functionality for a fraction of the price.

"In previous positions, we had used On24 to host webinars," Greenstein said. "On24 and Zoom have similar functionality, but On24 was significantly more expensive."

With an affordable means of hosting free webinars, Complyport could demonstrate its wealth of knowledge on financial compliance and regulations and position itself as a leading expert within the industry.

"Now we target our marketing a lot more around the webinars," Greenstein said. "We use them to demonstrate our knowledge and understanding of the topic to get people to come to us. I'm more than happy to give people a bit of education for free on the basis that it shows that we are subject matter experts."

These free webinars hosted by Complyport led to greater exposure, which in turn generated more interest in the company and drove the acquisition of new clients, all without spending the time and resources that an email marketing campaign requires.

"Our customers seem to be interested in the content we're putting out there," Greenstein said. "We've gotten new clients, which is great, and it's less work-intensive than putting out the amount of emails you would need to market the same sort of content. Plus, it's much more interactive."

After Complyport experienced the quality of Zoom Webinars, the organization decided to adopt Zoom

Meetings to further supplement its marketing efforts, which allowed Complyport to showcase the capabilities of its services through one-on-one video meetings.

"Once we started using Zoom for webinars, we saw the meeting facilities and wanted to use it for demonstrating our online regulatory technology tools," Greenstein said. "For people who are not based in London or don't have the time to meet us, we'll set up a Zoom Meeting and get them online to have a look at all the different tools and our suite of apps."

Result

Using Zoom Meetings and Zoom Webinars, Complyport increased the reach and effectiveness of its marketing efforts without a huge investment.

Zoom works as a powerful international marketing tool for Complyport, and as it continues to grow, Greenstein is further evaluating how Zoom can make a difference. Greenstein says he's considering Zoom to host online courses for a new financial services training academy, the [London Governance & Compliance Academy](#), in 2020.

"I will be helping set up a new financial services training academy, and we anticipate to carry on using Zoom, probably in higher amounts compared to what we've been doing so far," Greenstein said. "I regularly tell people how the service has been with Zoom, and I'm more than happy to see what other services Zoom offers."

If financial regulation and compliance interests you and you want to see Zoom Webinars in action, follow Complyport on LinkedIn and sign up for webinars as they are posted.

Zoom helps businesses and organizations bring their teams together in a frictionless cloud environment to get more done. Our easy, reliable, video- first unified communications platform for video, voice, content sharing, and chat runs across mobile devices, desktops, telephones, and room systems. Founded in 2011, Zoom is a publicly traded company on Nasdaq (ticker: ZM) and headquartered in San Jose, California.

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