

**CAASA BRINGS**

**A SPOTLIGHT TO CANADA**

on the global alternative investments market with Creatio



## ① **BRINGING TOGETHER ALTERNATIVE INDUSTRY REPRESENTATIVES**

The Canadian Association of Alternative Strategies & Assets (CAASA) was formed to bring together alternative investment managers and investors, along with service providers, in a setting conducive to information sharing, discussion and networking, and collaborative initiatives.

CAASA represents a broad cross-section of public and private market participants whose offerings are distributed to true retail, Accredited Investor retail, family offices, endowments, foundations, public and private pension plans, and sovereign wealth funds. As a truly national organization, CAASA runs its activities in all Canadian areas, including large asset management hubs, high investor density hubs, and those where service providers assemble.

## ② **A COLLABORATIVE SETTING FOR INDUSTRY DEVELOPMENT**

CAASA is a member-driven organization who believes that a strong network of industry participants and leaders, can power growth and innovation of the industry. One of the membership's major benefits is participation in conferences, forums, live and online events. The organization gathers speakers and participants from both Canadian and global investment management houses to pursue its primary mission of bringing Canada to the world and the world to Canada.

Planning and organizing events of such caliber and frequency require a lot of organization, time, and effort. Each event begins with the segmentation of the target event audience, an invitation to join, a collection of all attendees data, the tracking of responses, and the sending out of reminders. To smoothly operate a vast amount of contact data and efficiently manage events, CAASA uses Marketing Creatio.

**The low-code nature of the platform allows for easy adjustment of processes to the company's unique business model.**

### ③ **MANAGING COMPLETE EVENT CYCLE WITH CREATIO**

Marketing Creatio helps CAASA run the full event cycle by segmenting the target audience, monitoring and running personalized marketing campaigns, and measuring engagement. The system helps estimate the budget, track ticket numbers for paid events, and send notifications to participants to remind them about the upcoming conference.

Once the contact is registered, the system creates the event participant card linked to the particular account or contact. This allows CAASA employees to view the attendee response, the number of tickets, the trans ID, the payment status for paid events, and the time for a subsequent notification to be sent to the contact.

As of recently, the majority of the company events are held online. Though it's hard to replace in-person presence, it is still possible to provide a significant online experience with the right tools in place. To run their online events, CAASA uses Zoom.

**With the help of Creatio no-code customization tools and email communication automation capabilities, the company streamlined the event invitation process.**

CAASA sends confirmation and reminder emails to their event participants with Zoom details embedded from Creatio.

Besides events, CAASA offers insightful educational content such as podcasts and publications to explore the industry's ins and outs. The company also provides mentorship and scholarship programs for its members to enhance professional growth. To become a member, an individual or organization must fill out the membership application on the website and, once the membership is approved, pay a submission fee. The Creatio platform handles these applications, converting them into leads and ensuring efficient follow-up communication leading to membership growth.

*“Creatio has been a key aspect in the growth and early stages of building our association. It allowed us to automate many of our member experience processes and marketing campaigns giving our small team the ability to focus on long-term strategic goals and continual growth.”*

*Caroline Chow, Vice President*

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## THE LOW-CODE TECHNOLOGY FOR EASY COMPLIANCE PROCESS CUSTOMIZATION

To regulate the use of digital technology and protect customers and businesses from undesired content and malware, Canada's government passed the anti-spam legislation (CASL). Since 2014, every organization must request consent for communication with its members or customers.

For CAASA to comply with CASL requirements, the tailor-made process was designed on top of the Creatio low-code platform. While registering, subscribing to newsletters or applying for membership, all registrants are presented with a 2-year communication consent option. A month before CASL consent expires, the system sends an automatic notification to the customer informing them about the expiration. If there is no response from the customer, the system sends an additional reminder. If the customer approves, the system automatically prolongs CASL consent and stores the information on the date it was received. When the company receives the inquiry from the existing contact, CASL consent is automatically saved. By having this process automated enables CAASA to better manage customer communication.

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## ONE TECHNOLOGY TO COVER MULTIPLE BUSINESS NEEDS

Being the home and the heart of the alternative investment community, CAASA applies itself to sustain an efficient and insightful collective with a collaborative setting, contributing to the industry development and representatives' success. Meanwhile, Creatio is putting its best foot forward to help CAASA with its mission by providing tailored-made solutions covering the company process management needs. A single solution to manage database, leads, and organize events, and ensuring all processes comply with CASL, allows CAASA to focus on higher-level activities.

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ABOUT CAASA



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MARKETING CREATIO

