



LPL FINANCIAL

A CASE STUDY

UNIFIED^UAV

Systems

Unified AV Systems has been providing audiovisual and communications systems to corporations, government entities, educators, and religious organizations for over 25 years.

We not only have the largest presence in our industry in the Southeastern United States, but we achieve a national and global reach through our network of AV Partnership firms.

We focus on the tools of communication and collaboration to help clients connect throughout their organizational structures; with their clients and partners as well.



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THE CLIENT : LPL FINANCIAL

PRIMARY MISSION

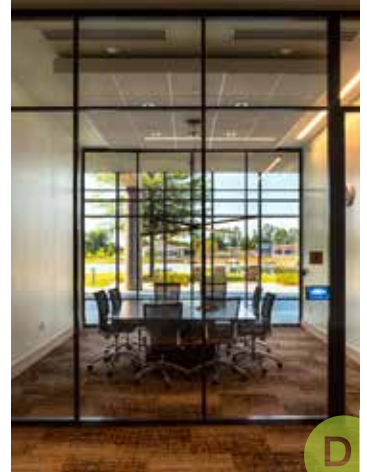
The primary mission of LPL Financial is to provide objective financial advice to as many people as possible. To do this, it depends on building relationships with its clients and connecting with them at a one-on-one level. Its growth depends on helping its clients achieve their financial goals. And to build those relationships and connect to its clients, LPL Financial relies on a dedication to service combined with technological capabilities.

CHALLENGE

LPL Financial's recent growth trajectory created a need to move into a new space in South Carolina. In addition to requiring more room for its current and anticipated employee resources, it wanted to create a technologically-enhanced space that would help its model fully take hold. It needed connected meeting space to allow presentations and multi-location collaboration. It also wanted audiovisual equipment and signage throughout the work space to further enhance the collaborative nature and the technological culture of the company.

INITIAL INSIGHT

For LPL Financial, Unified AV made sense. It needed a company on which it could rely to meet tight timelines and handle the logistics of a large technological build-out. Unified AV came with both the size to handle the project and a reputation unrivaled in the region. And because LPL Financial has a prior working relationship with Unified AV, it knew it could rely on work that gave both tremendous quality and also efficient, timely completion. After LPL's decision-makers narrowed the decision to five potential audiovisual providers, the review process, including internal recommendations, led to Unified AV as the unanimous selection.



- A. The 2x2 Videowall in the cafeteria keeps employees informed during breaks
- B. The Zoom room is a space that allows impromptu collaboration with offsite parties. The 5 Monitors display various video inputs.
- C. The J-Room has video and audio conferencing capabilities, in-table wired and wireless inputs and dual displays. An automated control system adjusts video inputs, microphone and speaker levels. The room is monitored through an IP camera and a remote management system for room analytics and scheduling.
- D. The Breakaway audio conference room has room scheduling that indicates the availability of the room and allows walk-up reservations.
- E. Digital signage is located throughout the facility to inform, update and entertain employees and guests.
- F. The HOV large conference room has video and audio conferencing capabilities, in-table wired and wireless video inputs and dual displays. An automated control system adjusts video inputs, microphone and speaker levels. Mic zone for rear overflow seating allows additional participants to be heard. The room is monitored through an IP camera and a remote management system for room analytics and scheduling.

LPL'S GROWTH : A GOOD PROBLEM TO HAVE

SPEEDY EXPANSION

Not every company treats growth as a goal, but most do. Companies grow because they perform well. Providing excellent service to as many clients as possible falls within the LPL Financial mission statement, so getting bigger has been and will remain embedded within its cultural DNA.

With this in mind, LPL's prior space could not have been enough. That it was ready to expand into a new facility represents much more than the proverbial good problem to have. It serves as a validation of the work the company has done, and of the direction in which it continues to move. LPL Financial, if it performed well, was always going to have to make this move. It was just a matter of when.

Even so, a good problem to have is still a problem. The current space was no longer enough to house its employees effectively. It could not hire the employees needed and remain where it was. LPL Financial needed not only to move, but to do so quickly enough to avoid losing productivity or support to its team of financial consultants and their clients. For a growing, fast-moving financial services company, neither staying put nor enduring a lengthy transition presented a viable option.

ADDED TECHNOLOGY

Finally, in addition to the size constraints, the prior corporate space lacked the technological capabilities to fully advance the company mission. With expansion came the need for improved communications capability. The company needed to connect across the country and the world – not only with its other corporate centers, but with consultants and clients as well. LPL Financial wanted sufficient space to grow into its goals and a state-of-the-art environment for business communication and collaboration.



SOLUTIONS UNIFIED AV PROVIDED

Unified AV stepped in with a full array of solutions to meet LPL Financial's needs. The new facility delivers the company's technical needs while providing comfort and functionality at the same time. It gives an already-growing company the ability to do more for its internal and external clients.

MEETING / CONFERENCE ROOMS

SMART ROOMS

Meeting and conference rooms are setup as “smart rooms” with everything needed to communicate throughout the company and beyond. Automated room control allows LPL Financial to direct everything that happens in the room. From a single panel, the person running the meeting can power systems on and off, adjust the lighting as needed, operate motorized projection screens, and switch among various media inputs. The needs of every presentation in the room sit literally at the presenters’ fingertips.

This allows LPL Financial to hold effective meetings in an efficient workspace. But functionality within the room is only part of the picture. The company works across multiple locations and must hold meetings that bring all of those people together. The video conferencing system that Unified AV installed allows everyone to see others in the meeting and conduct face-to-face meetings from across the country.

PAN-TILT-ZOOM TECHNOLOGY

Pan-tilt-zoom (ptz) cameras help achieve this to an even greater extent by allowing the screen to focus on an individual speaker’s face or bring the entire conference room into view. Just as participants in the same room would adjust their focus during the course of the meeting, this ptz technology creates the same effect for those sitting in entirely different rooms.

SIMPLICITY

Perhaps most importantly, the technological firepower comes with simplicity. The best system can hinder productivity if it does not allow for quick access and functionality; Unified AV set the system up to work with minimum touches, so conference participants can step-in and go quickly. The time and effort saved mean a streamlined, efficient process for video conference meetings.



- A. H-Conference areas are huddle spaces that allow easy reconfiguration adjustments depending on the number of participants. Wireless video inputs to multiple displays make team collaboration effortless.
- B. The HOV break areas are equipped with displays capable of displaying multiple inputs including television and wireless video sharing.
- C. The K-Room has video and audio conferencing capabilities, in-table wired and wireless inputs and dual displays. An automated control system adjusts video inputs, microphone and speaker levels. The room is monitored through an IP camera and a remote management system for room analytics and scheduling.
- D. The J-Room has room scheduling that indicates the availability of the room and allows walk-up reservations in addition to video and audio conferencing capabilities, in-table wired and wireless inputs and dual displays. An automated control system adjusts video inputs, microphone and speaker levels. The room is monitored through an IP camera and a remote management system for room analytics and scheduling.
- E. Digital signage is located throughout the facility to inform, update and entertain employees and guests.
- F. Support columns are wrapped with 'wall-street' style tickers displaying up-to-the-minute stock information.

CONNECTING THE REST OF THE SPACE

MORE THAN JUST A CONFERENCE ROOM

Building out the primary conference rooms accomplished part of the connectivity needs LPL Financial presented. It needed to reach beyond the office location in other spaces, too: for corporate training, individual meetings, financial updates, and more generally for reaching out to clients and partners across the country.

The LPL Financial training needs were twofold:

- 01 To build an accessible training library
- 02 To create spaces for training events to occur

For the former, Unified AV installed recording studio technology and integration equipment. LPL Financial can create state-of-the-art video training material to present to its team members across the country. And by integrating this technology to the video screens and room controls, Unified AV created the ability to present and transmit these materials anywhere in the country or the world.

Small meeting rooms give additional communication centers to LPL Financial. Zoom rooms enable short-notice meetings and presentations with clients and partners alike, and huddle spaces give team meetings new potential with one-touch capabilities for more efficient use of time.

Finally, Unified AV built out the remainder of the space to combine functional and aesthetic design elements. Digital signage throughout the space enables LPL Financial to electronically update room schedules and meeting notifications. Live tickers wrapped around columns not only give the space a Wall Street feel, but provide constant stock and fund updates for the team of financial advisers as well. And the video wall in the cafeteria allows continued connection to the company and to the world, even during meal times.



- A. The K-Room has video and audio conferencing capabilities, in-table wired and wireless inputs and dual displays. An automated control system adjusts video inputs, microphone and speaker levels. The room is monitored through IP cameras and a remote management system for room analytics and scheduling.
- B. The J-Room has video and audio conferencing capabilities, in-table wired and wireless inputs and dual displays. An automated control system adjusts video inputs, microphone and speaker levels. The room is monitored through IP cameras and a remote management system for room analytics and scheduling.
- C. The break areas are equipped with displays capable of displaying multiple inputs including television and wireless video sharing.
- D. Support columns are wrapped with 'wall-street' style tickers displaying up-to-the-minute stock information.
- E. The P-conference room has video and audio conferencing capabilities, in-podium wired and wireless video inputs, a presentation projection system including automated retractable screens and a rear confidence monitor. The podium includes a speaker microphone and control system to adjust lighting, video inputs, microphone and speaker levels.
- F. A fully outfitted recording studio gives LPL the ability to create their own professional informational programming.



- A. From the 2-story atrium you can easily see support columns wrapped with 'wall-street' style tickers displaying up-to-the-minute stock information.
- B,D and E. The P-conference room has video and audio conferencing capabilities, in-podium wired and wireless video inputs, a presentation projection system including automated retractable screens and a rear confidence monitor. The podium includes a speaker microphone and control system to adjust lighting, video inputs, microphone and speaker levels.
- C. The break areas are equipped with displays capable of displaying multiple inputs including television and wireless video sharing.

CHALLENGES TO IMPLEMENTATION

TIME CONSTRAINT

One of the key challenges LPL Financial faced came with its aggressive timetables. Client needs aren't put on hold while a company tends to its expansion. LPL Financial had outgrown its space, and could not afford to linger in moving into something new. Unified AV had to work quickly to put the technology in place to get LPL Financial not only up and running, but moving to the next level of communication and presentation capabilities.

Of course, Unified AV was not the only player involved. LPL Financial was building out a new space, and the technology piece had to fit within construction scheduling. Therefore, working quickly would never have been enough. Rather, Unified AV had to marry efficiency to flexibility. It had to prepare and adapt its timing and logistic approach to the creation of the space in which its technology would reside. LPL Financial needed a partner with both person-power and experience to make all of the moving parts fit together. Unified AV was the only choice LPL Financial could have made under the circumstances.

HOW UNIFIED AV HELPED LPL SUCCEED

LPL Financial came to Unified AV with both immediate needs and longer-term needs. In the moment, getting a space set up to accommodate both its current headcount and future growth was dominant. LPL Financial was ready to move, and needed the space quickly. The space needed to be ready and the technology needed to work when the company moved in.

Unified AV rose to the challenge, putting in extra hours around a flexible schedule to ensure the work was completed on time. All equipment was installed and tested around the demands of the timeline for opening the site and the schedule set for construction of the space. As difficulties arose, Unified AV met them with expertise and creativity. When it came time to install tickers wrapped around the columns, for example, Unified AV used suspended airline cables to make the solution work well for the client.

But beyond this, they worked to help standardize both the technology and the processes for using it throughout the space and the company. The companies worked together for about two years to learn ways to get the most from the technology to meet the specific needs that LPL Financial brought to the table. The technology the company uses now operates with minimal touches to both maximize efficiency and minimize mistakes. Unified AV worked with LPL Financial to help eliminate the user errors that constitute the majority of technology problems on site, through a combination of simple, streamlined interfaces and standardized processes. The result is a growing consistency throughout the organization.

The partnership that LPL Financial and Unified AV developed continues to pay dividends. The space is designed to allow for a virtually seamless interface between the Fort Mill location and other locations, whether as corporate centers or individual advisor offices. Unified AV thus met both the immediate and longer-term needs of a company eager to grow and expand its service, both to its expanding roster and to its growing client base.

The success of the Fort Mill campus has reinforced the confidence LPL staff has in Unified AV Systems. In response they have decided to give Unified AV the responsibility to manage, service and provide solutions for all LPL locations.

THE UNIFIED AV SYSTEMS TEAM



Consulting



Engineering



Project Management



Programming



Technical Installation



Service

From our Sales Consultants, Engineers and Programmers to Project Management, Technicians and Service, our team of knowledgeable, and certified, AV professionals, is here to guide you each step of the way from initial concept through implementation and maintenance.

Our business is about improving your organization, turning operational challenges into positive outcomes.



Corporate



Education



Government





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