



## INVESTORPLACE MEDIA

### ESCAPING THE QUICKSAND WITH SAP® BusinessObjects™ SOLUTIONS

#### QUICK FACTS

##### Company

- Name: InvestorPlace Media LLC
- Location: Rockville, Maryland
- Industry: Media
- Products and services: Financial publications
- Revenue: US\$70 million
- Employees: 125
- Web site: [www.investorplace.com](http://www.investorplace.com)

##### Challenges and Opportunities

- Effectively leverage massive volumes of data from multiple sources for marketing campaigns
- Provide targeted communications and services for customers
- Deliver actionable information to all marketing groups

##### Objectives

- Implement integrated business intelligence (BI) and information management solutions to consolidate data management processes
- Empower decision makers with flexible data mining and reporting tools
- Support the partner ecosystem with data integration functionality

##### SAP® Solutions and Services

- SAP® BusinessObjects™ Enterprise Premium software
- SAP BusinessObjects Data Integrator software
- SAP BusinessObjects Web Intelligence® software
- Crystal Reports® family of offerings

##### Implementation Highlights

- Detailed analysis of underlying data structure
- Completion of project in a matter of week

##### Why SAP

- Robust reporting tools
- Expertise in BI solutions

##### Benefits

- More efficient reporting environment for all users
- Highly targeted marketing campaigns
- Reduction in list selection process from 8 hours to 30 minutes
- Sharper focus on actionable information with ability to drill into the details
- Higher staff productivity and greater ability to answer complex marketing questions

“We are driven by our boundless curiosity – the main trait everyone needs to be successful here – and SAP BusinessObjects solutions make it possible to answer all the questions we’re asking. Our BI solution has become the heart of our operations.”

**Heath Warner**, Vice President of Business Intelligence, InvestorPlace Media LLC

People work hard their whole lives to build up a nest egg of retirement savings – the key to years of stress-free travel and recreation – and they want to be sure their money is invested wisely. Younger investors too are keen to leverage savvy investment advice, particularly in today’s busy online trading environment. Helping individuals optimize their portfolios is what InvestorPlace Media LLC is all about, and SAP® BusinessObjects™ business intelligence (BI) and information management (IM) solutions play a pivotal role in the process.

A publisher of financial advisory services for self-directed investors with headquarters in Rockville, Maryland, InvestorPlace Media has brought market-beating investment advice to the individual investor for more than 30 years. With net annual sales of approximately US\$70 million, the company helps investors build wealth in a serious, consistent way through consumer newsletters, e-mail services, Web sites, and other media platforms. Products include such well-respected publications as Louis Navellier’s *Quantum Growth*, Richard Band’s *Profitable Investing*, and Robert Hsu’s *China Strategy*.

### Taming the Flood of Data

Before InvestorPlace Media implemented its SAP BusinessObjects solutions, the company’s BI staff was overwhelmed with huge volumes of marketing data from disparate sources. Previously, as a direct-mail house, InvestorPlace

Media simply tracked whether an end customer did or did not purchase specific products. But with the advent of e-mail and the Internet, much more sophisticated response metrics became available for market segmentation purposes: Did the customer open the e-mail message? Did she click on one or more of the embedded links? Which specific pages were viewed? Did the customer make a purchase?

“It was virtually an overnight success. Once we validated the data and flipped the switch, we cut our normal eight-hour list selection process down to half an hour. That created a lot of buzz in the company.”

**Heath Warner**, Vice President of Business Intelligence, InvestorPlace Media LLC

“We were caught in the quicksand of all this new data,” says Heath Warner, vice president of business intelligence at InvestorPlace Media. “We knew the data was important to our business and to the marketing decisions we make,

but we couldn’t use it effectively until we applied the power of the SAP BusinessObjects tools. They helped us sift through the data and provide actionable information to our marketing group in a timely manner.”

### Choosing the Power Tools from SAP

Warner and his team did their homework. First, they carefully researched the leading BI products on the market, finally choosing SAP BusinessObjects Enterprise Premium, SAP BusinessObjects Web Intelligence®, Crystal Reports®, and SAP BusinessObjects Data Integrator software – an “easy choice” according to Warner.

The team worked on the underlying data structure, taking several months to make sure everything was right. Implementing the SAP BusinessObjects solutions took only a matter of weeks. “It was virtually an overnight success,”

recalls Warner. “Once we validated the data and flipped the switch, we cut our normal eight-hour list selection process down to half an hour. That created a lot of buzz in the company.”



“We’ve got the wattage that we need from our SAP BusinessObjects solutions. Once we tackle the prospecting requirements, several other key areas of our marketing program are just lying in wait to go through a similar build-out of reporting and analytical tools.”

Heath Warner, Vice President of Business Intelligence, InvestorPlace Media LLC

SAP BusinessObjects Web Intelligence makes it possible to create easy-to-use universes, empowering high-level marketing executives to mine data directly and answer many of their own questions. Power users take advantage of Crystal Reports to develop sophisticated reporting applications. The software provides a summarized, or snapshot, view for executives and gives them the ability to drill down to the most granular details. SAP BusinessObjects Data Integrator was invaluable in establishing the data mart at the outset of the project. And SAP BusinessObjects Enterprise Premium acts as an overall report server at InvestorPlace Media. “It’s been very helpful in creating a more efficient reporting environment for all of our users – not just marketing but also accounting, customer service, and IT,” says Warner. “The efficiency lies in having everything in one place.”

### Improving Communication, Collaboration, and Customer Service

In addition to improving operational efficiency at InvestorPlace Media, the SAP Business Objects solutions make a big difference to the company’s subscriber base. “With a better understanding of our customers, we are able to target our marketing campaigns much more successfully,” says Warner. “For example, if we know someone has expressed interest in fixed-income invest-

ment opportunities, we don’t send them e-mails about growth-oriented strategies. This has made communicating with our customers a more fruitful experience.”

The partner ecosystem surrounding InvestorPlace Media – including the company’s fulfillment and e-mail mar-

infrastructure allows us to create multiple views of the data with minimal effort, so we can really slice and dice things in order to analyze how leads are performing after they get onto our database,” he says. “We’ve got the wattage that we need from our SAP BusinessObjects solutions. Once we tackle the prospecting requirements,

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keting vendors – also reaps significant benefits. “It’s taken a lot of pressure off them,” says Warner. “In the past, we looked to them for reporting solutions. We’d get data on marketing campaign success from our e-commerce vendor, and we would try to plug it into data we were receiving from our Web-hosting vendor – sort of like assembling a giant jigsaw puzzle in Excel. Now they just send us the data, and we use the SAP BusinessObjects solutions to put the jigsaw puzzle together.”

### Focusing on the Future

Warner already has a number of new BI projects lined up, and he plans to start with prospecting. “The power of our SAP BusinessObjects solutions

several other key areas of our marketing program are just lying in wait to go through a similar build-out of reporting and analytical tools.”

By providing solutions that make it possible to answer the most complex marketing questions, SAP has helped InvestorPlace Media unleash its creativity. All marketing groups can now customize their own reporting and use the data to answer their own questions, and executives have become more proactive about mining the data.

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