



## Investment Advisory Firm Builds Relationships and Revenue

### The Challenge

Schaeffers Investment Research was using a highly customized CRM system which was no longer supported, putting their customer data and business at risk. The company needed a platform that would enable continuous improvement.

### The Solution

Ease of integration with other applications (especially their Microsoft Dynamics GP solution), the ability to fine-tune communications, an ensured future for solution evolution, and dependable technology support made Microsoft Dynamics CRM the clear choice for Schaeffers. Schaeffers now has a fresh look at reporting, utilizing the full set of data surfaced through Microsoft Dynamics CRM, which provides opportunities to analyze data in ways that they hadn't previously considered. Better marketing automation allows for continued improvement in communication personalization and highly targeted promotions.

### Client Overview



Schaeffer's Investment Research is a privately held provider of stock and options trading recommendations, options education, and market commentary, headquartered in Cincinnati, Ohio. Its website, SchaeffersResearch.com, is updated throughout each trading day with breaking market news, analysis, and unusual options activity. Its analysts research is regularly quoted by mainstream national media.

### Results

- The IT team is spending less time with user training and troubleshooting
- Integration between Microsoft Dynamics GP and CRM has eliminated reporting burdens and manual data transfers
- Increased visibility of the inside sales reps activities has led to adoption of best practices

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