



PEI Media

PEI Media chooses TouchstoneBI and TimeXtender Discovery Hub® to support their Digital Transformation journey

THE CLIENT

PEI Media are specialist publishers & networking event providers for the Financial Services industry, focusing only on alternative asset classes. They major in private equity, real estate, private debt and infrastructure whilst also engaging with emerging new asset classes.

Formed in late 2001, their aim was to provide media coverage for those involved in Private Equity, focusing on the relationship between institutional capital and the fund managers tasked with investing this money. In 2016, with the intention of developing their operational capabilities, PEI Media appointed a new CFO and Chief Technology and Information Officer, building out the finance team and focusing on the opportunities that technology & digital innovation could bring to the organisation.

Finishing robustly ahead of plan in their first year of private equity ownership, 2017 was set to be the year of Digital Enhancement at PEI Media. It brought rapid advances to the ambitious technology investment programme started in 2016, which resulted in their publishing platform migrating from its legacy CMS onto WordPress, as well as the foundations being laid for a new CRM, subscription management and customer data platform.

Commercially PEI Media also moved forward, with Advertising & Sponsorship, Subscription Sales and Conferences all posting record breaking revenue growth.

THE CHALLENGE

To scale the business effectively and support business growth plans through a transformation programme to put data led insight at the heart of PEI Media's operation. Replacing legacy technology became a necessity for improved visibility of their data, ensuring robust data analysis. To achieve this, a new data warehouse platform was sought to store and manipulate the data from multiple production systems; providing operational reports, insight dashboards, analytics and ad-hoc queries using tools such as Tableau and PowerBI. The new data warehouse needed to fulfil key project goals and objectives:

- Improve data quality
- Provide one version of the truth
- Scalable, extendable & secure architecture
- Improve efficiency and save time
- Agile project delivery
- User friendly and intuitive

FINANCIAL SERVICES

CUSTOMER BACKGROUND

- Formed in late 2001 in a buyout by a team of managers working at a major listed financial media group
- Specialist information group that focuses only on alternative asset classes
- www.thisispei.com

SOLUTION SNAPSHOT

- TimeXtender Discovery Hub® Data Warehousing
- Connection to multiple disparate data sources
- Microsoft Dynamics CRM & NAV, Sailthru, Google Analytics, Sidetrade with historical data from Dotmailer
- Data presented in reports and visualisations through Tableau Data Export to BlueVenn for a Single customer View

BENEFITS

- Move from anecdotal to data led decisions
- Respond quicker to changing market demands and customer behaviour
- Accelerate the execution of the Digital Transformation Strategy

"We had a very specific idea of what we needed from the new Data Warehousing platform, having multiple disparate sources of data just wasn't allowing us to react to changes in the business quickly enough, so the new solution needed to enable efficiencies of reporting and analysis" Tony Skeggs, Chief Technology & Information Officer.

THE SOLUTION

PEI Media completed a tender process which shortlisted 3 solutions and providers. Touchstone BI was selected to implement TimeXtender Discovery Hub® – a Data Warehousing Automation platform based on Microsoft SQL Server.

They needed to connect data from multiple disparate sources, including Microsoft Dynamics CRM, Microsoft Dynamics NAV, Sailthru, Google Analytics and Sidetrade with historical data from Dotmailer. This data was to be presented in reports and visualisations using Tableau. This connected data had also to be made available to BlueVenn to provide a Single Customer View.

TouchstoneBI were chosen as the implementation partner because of their proven agile methodology and impressive track record in delivering similar projects to their customers. They demonstrated during the selection process that using TimeXtender Discovery Hub®'s "point & click, drag & drop" functionality would significantly shorten the ETL (Extract, Transform and Load) process time, as well as enabling less reliance on technical specialists to deliver the benefits to PEI Media at the pace they needed.

This combination of TimeXtender Discovery Hub®'s functionality and TouchstoneBI's product knowledge and experience gave PEI Media the confidence that the new data warehouse platform would be successfully delivered within their timescale.

PEI Media's CTIO Tony Skeggs says "After a couple of days' workshop trialling the software with a Touchstone BI consultant, we were able to prove connections to multiple sources, it gave us the confidence that they would deliver"

An Agile project methodology, combined with the flexible Microsoft SQL based platform enabled rapid delivery of the solution, and allowed for quick project refinement as the data discovery opened up new areas that required investigation.

Andes Loukianos, Head of Touchstone BI comments, "finding ourselves ahead of the project plan, we were able to add an extra data source, Microsoft Dynamics NAV, allowing the finance team to also benefit from the early phase of the project. We helped the PEI Media team deliver value to key stakeholders within 3 months"

Strong collaboration and a partnership approach was key to the success of this implementation. The project managers from both sides met at regular intervals to ensure the project was on track and to agree the resources required for the ensuing work.

"We have been very impressed with the Touchstone BI consultancy team. They were able to espond to every challenge we posed, delivering the project within our tight timescale" says Sandra Ragues, PEI Media, Head of Business Insights. "This has been one of the most successful IT implementations I have been involved with, delivering on time and on budget". PEI Media are now reaping the benefits, enjoying vastly improved accuracy of data and performance; complex joins and transformations have been eliminated in Tableau and moved into the data warehouse allowing PEI Media to analyse data more easily, more consistently and include more information on one dashboard report without sacrificing performance of the reports.

Tony Skeggs reflecting on the project outcome, "We have gone from a mountain of spreadsheets, labour intensive processes and multiple interpretations of the results, to a Tableau reporting suite and a platform that delivers a Single Customer View. We are now able to provide the business with valuable insights that were either not possible before TimeXtender or took too long to generate to be useful in making better informed decisions"

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Tony Skeggs, CTIO, PEI Media

You're in good company

TimeXtender's Discovery Hub® provides companies with instant access to data, enabling them to make quality business decisions with data, mind and heart. Because time matters.

To learn more about Discovery Hub® and how the power of automation can move your business forward, visit:

www.timextender.com

www.touchstonebi.co.uk

TIME X TENDER