



Sitecore
Case Study:

Cabot

Heritage Corporation
Independent Investment Advice Since 1970

Cabot Heritage – One of America’s Most Respected Financial Newsletter Companies Triples Subscription Sales Using Sitecore CMS

Summary

Cabot Heritage Corporation is one of the oldest and most respected independently owned financial newsletter companies in the U.S., providing unbiased high-quality research and investment advice to individual investors and investment professionals. With eight newsletters targeted to particular types of investors, Cabot sought to bring its intense, in-depth fundamental and technical analysis to a wider audience.

In order to attract new subscribers while maintaining the quality of stock market news, articles and advice that current clients had come to expect, Cabot sought a CMS that would allow them to provide dynamic free content to prospective subscribers, while integrating the security requirements of their existing subscriber database into the new system.

Challenge

With their custom-built CMS, Cabot’s former site was geared to existing customers with password-protected access to specific information. Potential new subscribers were limited to what essentially amounted to a static “about” page with minimal content.

Cabot offers eight targeted newsletters, ranging from daily to monthly, so new content for the password-protected sections of the old site was constantly being developed and would sometimes need to be changed overnight.

As many of the sections were hard-coded, the Cabot IT staff would have to contact their design firm, who would in turn have to contact the CMS vendor to make the requested changes on their behalf.

According to Jon Heller, IT Director at Cabot Heritage, “The driving force behind our search for a new solution was our goal of engaging our current customers on a new level, while also attracting new subscribers with current information on the stock market, investor education and Cabot investing advice.” And all of the new content would need to be updated in a timely and practical manner.

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Cabot Heritage
Site
www.cabot.net





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**—Jon Heller,
IT Director,
Cabot Heritage
Corporation**

Solution

After researching several other CMS options, Cabot Heritage realized that Sitecore’s industry-leading CMS was the best fit for their needs. Says Heller, “When we were first looking at Sitecore, the answer to every requirement and goal was ‘yes, Sitecore does that.’”

Having made their selection, Cabot Heritage was able to start development quickly. Working with internal resources such as a graphic designer, IT staff and Heller, who successfully completed Sitecore’s comprehensive training program, they were able to design a site that would allow them to accomplish their goals of pleasing both existing and potential customers.

The Sitecore CMS user interface, designed to be intuitive for those without technical or developer backgrounds, was the perfect fit for Cabot, which currently employs 15 people full-time, most of them editorial and marketing staff. The designated developer on staff, Heller conducted internal training for content editors at Cabot Heritage.

Since the content editors were all familiar with the Microsoft Office suite, they quickly learned how to accomplish their goals with regular site updates using Sitecore CMS.

Result

Today, Cabot’s investment advisories deliver independent advice on investing in common stocks to more than 150,000 investors worldwide via newsletters on growth stocks, value stocks, green investments, emerging markets, and much more. Cabot Heritage has seen an uptick in traffic: both new customers and

happy clients are coming to the site in record numbers. Organic traffic has increased to thousands of visitors per day, most of these prospects engaged by the site’s appealing look and feel. Sales of subscriptions to the newsletters have increased approximately 300% since the site’s relaunch.

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The implementation of Sitecore’s CMS proceeded so smoothly that Cabot Heritage is already looking ahead to the future of the site: a re-design is already in the works to take advantage of Sitecore’s flexibility and strength in personalization by increasing dynamic content, such as displaying relevant stock data (price, increase/decrease, etc.) when that particular stock is recommended in a Cabot newsletter.

Other changes in the works include enhanced search features, enabling commenting, highlighting popular posts and more.

Technology Description

Site Special Ingredients

Proprietary database connection

Optimo integration



Sitecore’s Web Content Management System (CMS) and portal software solutions enable companies to deliver compelling web experiences. Sitecore’s award-winning CMS software makes it easy for businesses to create and update dynamic, full-featured websites of all types. Sitecore’s industry leading flexibility and scalability allows companies to better leverage their content, improve customer experience and drive business growth.

Thousands of public and private organizations, including national governments and Fortune 500 companies utilize Sitecore solutions for their websites. These organizations have created and now manage more than 20,000 dynamic websites with Sitecore including Microsoft, Sara Lee, Siemens, Toshiba, Omni Hotels, Computer Associates, ISS and Atlanta Falcons. Sitecore has offices and representatives in more than 50 countries around the world.

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