

# Best Practices for Investor Relations



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One of the most stressful aspects of investor relations communications is conducting quarterly earnings release calls. As the most high-profile exposure you have with your shareholders, investors and analysts each quarter, these calls present an opportunity for you to deliver your message in a manner that will have the highest possible impact for your audience.

Below you will find helpful hints to use when planning and executing your call. By following these tips and using the recommended features, you can not only make the most of these all-important conferences but also avoid many of the pitfalls that can plague large, high-profile investor relations conference calls.

## **BEST PRACTICES FOR YOUR IR CALL**

- + Keep in mind that an average adult only listens with a high level of retention for about 30 minutes when planning your call. Try to keep the presentation portion of your conference to that length.
- + Switch speakers during the call so you change the tone and the pace of the conference. This will help maintain participants' interest.
- + Practice the delivery of your news a few times, even if you are reading your quarterly results directly from a script, so you sound more comfortable with it and improve intonation and pacing.
- + Schedule your call at least two weeks in advance so you can distribute the call information and dial-in numbers to your participants. Remember—you can still make changes to the call details if needed.
- + Consider using a single vendor to handle both the live conference call and the web streaming and archiving. This eliminates confusion, streamlines your process and allows easy playback for those who miss the call.
- + Conduct a conference walk-through prior to your call. This will ensure that you are on the same page with all of your call's presenters – including your call's lead Operator – and can help you avoid minor issues that can become major if not discussed.
- + Ask each speaker to use a headset or telephone handset when delivering your investor news instead of being all together around a conference table. The sound quality from a speaker phone can distract from the message.

## **FEATURES AND CAPABILITIES TO ENHANCE YOUR IR CALL**

- + View your participant list and question queue online with a web-based service like **Leader-View<sup>SM</sup>**. This feature allows you to manage the Q&A portion of your call more effectively and be more prepared for upcoming questions.

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- + Use a **Communication Line** as a good alternative to the online option above; having someone managing the call behind the scenes gives you more control over the conference.
- + Have a recording of your IR call readily available in order to be compliant with Reg FD. Most companies choose to post an archive link on their website, but you should also make the call available on **Encore<sup>SM</sup>** which gives those without access to the web a way to listen to a digital recording of the call using a dial-in number. You can also use **Podcasting** and allow employees, customers or colleagues to listen to your recorded conference by downloading it from the Internet to a personal audio player (iPod) or aggregator (iTunes or Juice).
- + Make your call more engaging and interactive using **web conferencing** to push a PowerPoint presentation or add other multi-media elements to your call. Visuals add a new dimension to the conference and can be very helpful with increasing participants' retention and maintaining their attention throughout the conference.
- + Some of the other features to consider adding to your IR call reservation include: **Participant Report, Transcription, Call Recording** and **PR Distribution**.