



# INTERCALL®

## BEST PRACTICES FOR INVESTOR RELATIONS CALLS

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. To help you get the desired results from your IR calls, InterCall® has put together this guide. By following these tips and using these features, you can not only make the most of these all-important touch points but also avoid many of the pitfalls that can plague large, high-profile Investor Relations conference calls.

### ▶ BEST PRACTICES FOR YOUR IR CALL

- When you're planning your conference call, remember that an average adult only listens with a high level of retention for about 30 minutes. Try to keep the presentation portion of your call to that length.
- By changing speakers, you change the tone and the pace of the call. This will help to keep participants' interest at a maximum.
- Although you may be reading your quarterly results directly from a script, practicing the delivery of this news a few times can help you sound more comfortable with it and improve intonation and pacing.
- Schedule your call at least two weeks in advance so that 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.
- As much as you might love to deliver your investor news from around a conference table with your entire IR team, it's better to ask each speaker to use a headset or telephone handset. The sound quality from a speaker phone can distract from the message.

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

- Use a web-based service like **Leader-View**<sup>SM</sup> for viewing your participant list and question queue online. This feature allows you to manage the Q&A portion of your call more effectively and be more prepared for upcoming questions.
- A **Communications Line** (Commline) is a good alternative to the online option above; having someone managing the call "behind the scenes" gives you more control over the conference.
- Having a recording of your IR call readily available has become vital in the wake of 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 via a Dial-In Number.

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## FEATURES AND CAPABILITIES TO ENHANCE YOUR IR CALL CONTINUED...

- If you're interested in doing a more "high-tech" earnings call, use **Web Conferencing** to push a PowerPoint presentation or add other multi-media elements to your audio call. Visuals add a new dimension to the call 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: **Facts Complete<sup>SM</sup>** participant lists, **Transcription**, **Call Recording** and **PR Distribution**.

For additional information, please call [1.800.953.1817](tel:1-800-953-1817) or visit [IRcall.com](http://IRcall.com)® – InterCall's® online resource center dedicated to Investor Relations conference communications.

