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Host an Exceptional Investor Day:

Your Ultimate Checklist

Before the Event

- [ ] Partner with an IR consultancy that can ensure outstanding logistics and content.
- [ ] Develop a comprehensive timeline, including deadlines, to effectively manage each task's progress and ensure the team is fully aware of deadlines. InspIR offers a handy tool for this purpose.
- [ ] Determine whether this will be an in-person, virtual, or hybrid event.
- [ ] Discuss the key objectives for the event with your advisor.
- [ ] Select business lead presenters who are most directly related to your business growth drivers, also to introduce those team members that demonstrate the depth of the management team.
- [ ] Verify your date to avoid scheduling conflicts.
- [ ] Reserve the chosen date on management's calendar to ensure their availability.
- [ ] Define the event's format, such as a morning breakfast event or an afternoon presentation followed by a cocktail hour.
- [ ] Identify the perfect venue that reflects your corporate culture and the message you want to send, also organize a reliable webcast provider.
- [ ] Work with your IR consultancy to conduct a brief, focused pre-event feedback study of key investors and analysts. This ensures your presentations and discussion are addressing the topics and issues on your audience´s mind.
- [ ] Develop an event branding strategy for consistent visual identity.
- [ ] Develop a concise event website to centralize all relevant information.
- [ ] Prepare a targeted guest list for invitations.
- [ ] Distribute a save-the-date notice and issue a press release to officially announce the Investor Day.
- [ ] Reserve at least 2-3 months to develop the presentations and scripts for the event.

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Day of the Event

- [ ] Clarify each team member's responsibilities to ensure effective coordination.
- [ ] Organize badges alphabetically by last name on the registration table to ensure participants experience a smooth check-in.
- [ ] Collaborate closely with the webcast provider to ensure optimal audio and video quality.
- [ ] Verify that the venue's catering and AV equipment align with the pre-planned arrangements.
- [ ] Display thoughtful giveaways on guests' tables for an extra touch of hospitality.
- [ ] Affix lavalier microphones to speakers and perform sound checks.
- [ ] Test presentation and video files to guarantee seamless projections during the event.
- [ ] Distribute the event agenda to all teams involved, including AV, catering, venue, and webcast.

After the event

- [ ] Send out post-event surveys to attendees and compile responses within a comprehensive analysis report.
- [ ] Conduct an internal debrief session to review successful aspects and identify areas for future improvement.
- [ ] Issue a post-event press release featuring key messages and highlights of the company's presentations.
- [ ] Ensure event materials are easily accessible by publishing them within the Investor Relations website.
- [ ] Engage with investors who submitted questions via the webcast to provide further insights and build relationships.

Elevate Your Investor Day Experience:
Partnering for Success

Hosting a successful Investor Day requires a seamless combination of **strategic planning, engaging content, and flawless execution**. InspIR enables, your Investor Relations team to focus on shaping the core event strategy while we handle the i**ntricate logistics that make an event shine, with content preparation and support that best leverages your time and investment to ensure your messaging is optimally communicated…and heard by your target audience**.

Experience the difference of a **holistic, one-stop solution** that ensures every element of your Investor Day aligns with your company's goals.

To discuss your plans for the next Investor Day, reach out to:

Monique Skruzny
monique@inspirgroup.com
+1 212 661 2243

Pooja Rao
pooja@inspirgroup.com
+1 917 940 0817