New Technology in IR: Serving IR needs around best CRM practices

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New Technology in IR - Topics

Trends & Influencing Factors

Internal and external

Popular IR Technology Options

Connecting best practice to communication efforts

Best Practice: CRM Considerations

Options, functionality, usability and assistance

Making the most of your Budget

Clear, understandable, maximizing return

Efficiency Drivers

Improving workflow in relation to better intelligence





Trends and Influencing Factors

Economic and Political

Exchange Rates

De-listings

Corporate Governance

Budget cuts & team reductions

Travel restrictions – less roadshows

Alternative investor outreach and Targeting new investors

Technology based solutions





Popular IR Technology Options

Virtual AGMs

Greater audience reach, fully transparent, significant cost benefit

IR Websites

Proving content to engage, compel and stay connected (embedding content)

IR Apps / Social Media

Growing trend, succinct overview of IR website and reporting

Annual Reporting

PDF format, accessible to audience on mobile/tablet, cost reduction on hard copy

Webcasts

Increasingly popular, cost effective way to communicate

CRM

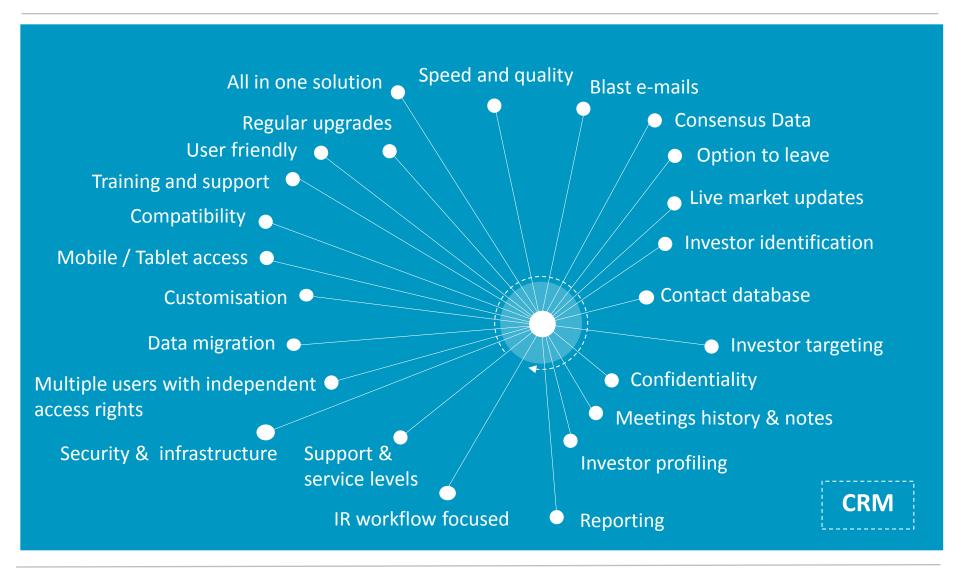
Part of IR tool-kit, monitor & record IR activity "on and off the road"

BEST PRACTICE – SHAREHOLDER





Best Practice: CRM Considerations







IR CRM Budget Solutions

Evaluate

Review your IR efforts versus strategy year on year – what works for you?

Engage & combine

Use CRM quant data in line with advisors to provide additional targets and logistics

Multi-solution services

- Consider one stop shop service providers with combined service packages
- Use their resources to support your IR team

Try before you buy

Before you commit, thoroughly test what is on offer. What will give you maximum return?

Get your CFO on side

 Engage with management to help realise the value of IR – use your CRM to demoreturn on effort

FOR YOUR **GETTING THE MOST**





IR CRM Efficiency Drivers

Data interrogation

Monitor your peer stock holders to quickly access capital moves

Reporting output

- Briefing notes to view on your tablet saves time in administration
- Board reporting in minutes

Immediate updates

Synchronise your note taking whilst on the road

Monitor your performance

• IR activity versus return on investment, in line with ID updates

Work smarter

- Use a CRM to improve your internal workflow
- When you are more efficient, it frees your time to engage more with investors

MAKE TIME





About Us

Orient Capital has been providing specialist IR support for over 25 years. With offices in London, New York, Hong Kong, Paris, Madrid, Johannesburg, Dubai, Melbourne, Sydney, we provide specific expertise in:

Shareholder identification and analysis

Bond identification and transaction support

Investor targeting

Perception studies

Webcasting

IR communications management technology - miraqle®

Proxy solicitation (D.F. King)

www.orientcap.com



