

# **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

INFLUENCING / COMMUNICATING

# Trends and Influencing Factors

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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  
ENGAGEMENT

# 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 demo return on effort

GETTING THE MOST FOR YOUR  
IR BUDGET

# 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 TO EVALUATE YOUR IR  
EFFECTIVENESS

# About Us

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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 - **miracle**®  
Proxy solicitation (D.F. King)

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