



MAKE YOUR IR PROGRAM EXCEPTIONAL

Four Tips to Upgrade Your Quarterly Conference Calls

- *Ditch the old format and keep the best parts.*
- *Be dynamic and don't be afraid to let your personality shine through.*
- *Generate a buzz: Make it more interesting for the audience, as well as the presenters.*

The goal of upgrading the quarterly conference call is to make changes that the company is comfortable with and that the market appreciates. These changes don't have to be drastic--- they can be small or barely noticeable.

Consistently improving your company's market communications is the key to an exceptional program.

This newsletter series of "IDEAL Conversations" by IDEAL Advisors focuses on shaking up the IR Program one step at a time. In this issue, we propose ditching the parts of the quarterly call and upgrading the process by making some adjustments.

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Four Tips to Upgrade Your Quarterly Conference Calls

Recently, I was working on a client's conference call speech, and she confided, "I wish we could just change the entire format, but my CEO would never go for it!"

I wondered if I could gently make suggestions to update the call format without making the company uncomfortable with the changes. Perhaps if I showed them what their competition was doing, they would realize that a shake-up was needed. But when I investigated their peers' quarterly process, I discovered that most were doing the same old thing: sticking to the original call format of introduction, review, and Q&A. Surely, we could figure out something that could achieve the **goal of updating the market on the quarterly numbers, while at the same time generating excitement around the call** that would be felt not just by the audience, but also with the internal team.

I ran across an article on LinkedIn, where a very forward-thinking IRO had completely *ditched the script*. Thus, the conference call skipped the introduction and went directly into the Question-and-Answer Session.

I realized that this might be too bold for a first step...but it got me thinking.

- What if we ***focused on creating a conversation with the participants***, rather than having the audience passively listen to a prepared speech?
- What if we changed the way we prepared the quarterly call, putting ***more of an emphasis on the Question-and-Answer Session***, rather than on the introduction and prepared remarks?
- And, what if we ***upgraded the call with modern IR tools, making it a video format***, to make the meeting more interactive and personal?



Let me put it this way: ***If we were doing a quarterly call for the first time in 2025, how would we format it?***

This is what I came up with:

1

REINVENT: GENERATE EXCITEMENT FOR BOTH, AUDIENCE AND PRESENTERS!

We would start by using live video instead of traditional phone lines.

While this would require the additional up-front work of creating a visually appealing “news desk” and getting the presenters “camera ready”, the conference would be significantly more exciting.

Aside from solely listening, that audience can *see the people who run the company*, as well as see its branding and corporate image. Here are some suggestions:



Figure 1: T Mobile conducts a live Quarterly Call (T-Mobile <https://www.youtube.com/live/KT50Wblboj0>)

- **Remember - It's not all about the numbers**, it's about building trust and allowing investors to have access to the people who do the front-line work. You may consider bringing in a “Special Guest” to join the call on occasion. New faces bring *dimension* to the company and help the market gain a deeper understanding of other personnel within the firm who are integral to its success.
- **Quarterly highlights + real-world comments.** For example, if company sales significantly rose that quarter, add a comment about the situation that contributed to that remarkable figure. This is interesting for the audience, but also for the presenters, who are given the opportunity to contribute their perspectives.
- **Use X, YouTube, and LinkedIn, as well as the company's website to post the video conference LIVE.** The information discussed in the call is public; therefore, use these tools to make it more easily accessible to all stakeholders. This supports *transparency, promotes fairness in the dissemination of information, and broadens the reach of your company's message.*

Consider:

-Training presenters in public speaking and non-verbal communication. Consider the tone of voice, body language, and facial expressions.

-Focus on the camera, not the script. Eye contact connects the audience to the speaker and builds trust.

-Involve the Corporate Communications and IR teams in the set and audio-visual setup. Consider props, background, colors, seating, and layout. Then, refresh it every few months.

-Take a look at companies that run successful video calls (See T-Mobile, Figure 1).

SUMMARY: Using technology can help bring the company to life. A video call can help the market see who the people are behind a stock ticker, thereby building trust.

2 OUTLINE THE MAIN DISCUSSION TOPICS AND ON FOCUS ON THE CONVERSATION

Connect with the audience.

Often, the conference call seems more like a *passive* presentation than an exchange of ideas and questions. As a **SPEAKER**, your job is to be informative, and for this, you must be very comfortable with what you say. As a **CEO**, your job is to connect with the market so that they invest in you.

We suggest you **generate an outline** of the main points of the call so that you don't miss discussing any valuable information. Then, focus on having a **conversation with your audience** and your fellow presenters. An unscripted but controlled conversation is more natural, and the audience will appreciate it! More importantly, your personality will more readily shine through. Some suggestions:

- **Video Preview via social media** – Some companies opt to post a video message via social media *before* the call. Here, they summarize the main points of the quarterly results. This will work to generate a buzz in the market, getting investors excited about joining the call (see **SilverX Mining** - Figure 2).
- **To be a good conversationalist, experts suggest...**
 - *Active listening* (See Tip #4)
 - *Sharing personal perspectives* – your point of view as the company spokesperson is important! We want to hear your opinions and how they pertain to the results.
 - *A sense of humor* – The best presenters are lively and make the audience feel comfortable --- with laughter!
 - *Being present* – If the tone is conversational, it will be easier to remain active in the conversation versus when just reading prepared remarks. Thus, focus on what is being said and your audience.



Figure 2: Figure 3: SilverX CEO outlines the focus for 2025 via a concise [video message](#)

Consider:

- **Set a time limit for your remarks.** Develop a rapport with your audience.
- **Skip the long introductions;** go right into an interactive discussion.
- **Start the call differently each time.** You can share a story about the company or tackle a difficult question.

SUMMARY: Practice the conversation a few times before the call, whether you follow an outline or a script. Ideas will flow more naturally if you are familiar with the material.

3

REHEARSE Q&A RESPONSES

ANTICIPATE THE QUESTIONS AND BE READY TO GO FOR IT!

IT'S ALL ABOUT THE Q&A...that's what most investors and analysts will tell you. *So why not put all the effort into maximizing this part of the call?*

Think about it this way: IR teams spend so much time preparing the quarterly information, but the time leading up to the call can become consumed with the script. Meanwhile, the most valuable part of the call --- *the audience questions* --- is sometimes not adequately prepared for.

If you follow our plan (See Tip #2) you will have eliminated the long, prepared remarks with a shorter, more organic conversation. This frees up the IR team to put all its **effort into answering the audience's questions** in the best possible way, even the toughest ones.

SUMMARY: *The goal in proper preparation for the Q&A Session is to ensure the market obtains the best responses. This builds credibility and reinforces trust.*

Consider:

- Holding **various practice sessions** before the call to go over potential Q&A.
- Be prepared to **answer questions that are not asked**, but that are important to tell the whole story for the quarter.
- Use the **PowerPoint presentation** to illustrate the most valuable points you are trying to make. For instance, support your ideas with figures, use bullets to outline strategic changes, or highlight the business reasons for an acquisition or a divestiture.

4

ACTIVE LISTENING

USE AUDIENCE FEEDBACK TO MAKE YOUR CALL STRONGER

Obtaining feedback from your audience and applying it to your communications materials signals to the market that the company values all perspectives.

Investors and analysts complain that companies are not willing to make the changes the market suggests, for example, in the case of quarterly or annual perception studies. Become an active listener by mentioning some of the comments you are obtaining from the market and acknowledging the importance of these. Whenever possible, make those changes that will bring greater transparency to the information you present. While no one expects the company to accept and act on *all* the feedback, they will appreciate it if the company discusses their reasons *why they cannot or should not* release certain data.

SUMMARY: *If your company goes through the process of obtaining feedback from the market, be willing to implement changes or state the reasons why you cannot.*



BONUS:

SEND CONFERENCE CALL ATTENDEES A THANK-YOU NOTE AFTER THE CALL

Investors and analysts are people too. Fostering a good relationship with them not only builds trust but also strengthens credibility. Something as small as a thank-you can go a long way in building this relationship.

Consider:

-Drafting a **thank-you email** that includes the highlights of the call.

-Include any **information that was pending from the call**, such as additional data, links, or a copy of the presentation.



LET US FIND WAYS TO UPGRADE YOUR
QUARTERLY CONFERENCE CALL
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