

# Investor Day Checklist



For public companies, a well-executed Investor Day can help move the needle when it comes to investor support and valuation. For an IRO, that means thinking strategically about the event's foundational messaging and tactically planning many details. To help you attract the right audience and effectively engage your investors, we've compiled a list of tasks that should be completed in the nine months leading up to your next Investor Day:

## Nine Months Out

- Identify overarching investor day goal
- Create a target speaker list using a filter of investor day goals
- Begin scouting and vetting possible locations and venues
- Target potential new investors and introduce the company by sending a digital fact sheet
- Begin assessing the need and approach to perception/sentiment study

## Seven Months Out

- Secure event date and venue
- Begin speaker outreach
- Select perception/sentiment study vendor and approach (if applicable)
- Supplement event timeline with company and event-specific details

## Six Months Out

- Begin foundational message development
- Send out save-the-dates
- Begin evaluating webcast vendors and options
- Secure event speakers
- Create an invite target list
- Initiate perception/sentiment study
- Consider and research giveaways and signage

## Three Months Out

- Circulate and finalize foundational messaging
- Review and integrate survey findings into foundational messages
- Secure webcast vendor
- Send out formal invitations with RSVP requests and the ability to track open rates
- Discuss pre/post-event reception options with the venue (if applicable)
- Order giveaways and signage (if applicable)

## Two Months Out

- Begin individual follow-up to targeted invitees (prioritize potential new investors)
- Design and circulate internal/corporate presentations
- Create a complete “run of show” for the day of the event
- Order catering for pre/post-event reception (if applicable)
- Provide instruction to all speakers around content requests (presentations, fact sheets, bios, etc.), including the date you'd like to receive the final documents
- Manage travel arrangements for speakers and any other necessary attendees

## One Month Out

- Continue individual follow-up to target invitees
- Connect with the venue IT department to understand all specs and requirements (you may consider connecting venue IT with a webcast provider)
- Confirm security procedures/needs with the venue; ask that the names of all attendees are collected
- Schedule Q&A and presentation prep sessions with internal presenters

## Two Weeks Out

- Finalize internal/corporate presentations
- Collect external speaker presentations
- Send a list of potential questions to external speakers
- Seek final approval from executives, legal, etc. on all materials
- Hold Q&A and presentation prep sessions with speakers and other executives in attendance

## One Week Out

- Finalize all event materials
- Print and ship materials to the venue (if applicable)
- Finalize details with the venue (room setup, catering, IT, etc.)
- Provide logistical details to speakers (dress, arrival time, etc.)

## Two Days Out

- Send final presentation and any other necessary materials to venue IT and webcast vendor

## One Day Out


- Send final attendee list and final run of the show to venue/security

## Day Of

- Arrive as early as possible; discuss any last-minute issues with the venue and check room setup
- Make any last-minute updates to the final attendee list and send to the venue/security
- Ensure the correct versions of all presentations are loaded and look right
- Do brief on-site practice if possible

## Follow Up

- Immediately send thank yous to all attendees; include a link to webcast replay and all other pertinent content (include clarifications and updates if necessary)
- Immediately send thank yous to all speakers and participants
- Consider posting a written transcript with a webcast replay



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