

Earnings Preparation Checklist



Earnings is a pivotal time for creating investor interest, influencing your shareholder base, and is your best shot at making a strong impression on the Street. This period provides a new opportunity to communicate your company's story, relay new strategies, and address your investment community. This checklist provides tips on how to maximize the impact of your earnings and drive success.

Update Your Website Materials

- Provide past and current materials through social and on your website for easy consumption, allowing those who are interested to learn more about your company.

Position Your Story Strategically

- Weave consistent messaging through all earnings communication, including the call script, press release, direct stakeholder communications, and even the Q&A.
- Ensure your current messaging aligns with what you've said previously.

Prepare Your C-Suite for Analyst Questions

- Assess your previous earnings and gauge if you were expecting the right questions along with what worked — and what didn't.
- Additionally, give them a list of what you've told investors during that quarter to remain consistent.

Manage the Sell Side's Expectations

- Watch for major media headlines and industry trends to identify stakeholder interests and the specific topics that will resonate.
- Conduct an online survey with participating analysts to understand which issues they most want to see covered.

Organize Call and Webcast

- When preparing the event, carefully consider where the call will be taking place and conduct a technology test-run: trial-run your equipment, audio quality, and any remote connections.
- Lighten your lift by finding a [qualified vendor](#) to help make your preparation and execution easier.

To learn more about how your event can help set you apart during peak earnings period, download our Ultimate Earnings guide [here](#).