



Zuora Case Study



CLIENT:

Zuora

MARKET CAP:

Small Cap

INDUSTRY:

Cloud Base
Software

SIZE OF IR TEAM:

Two

PRODUCTS WITH Q4:

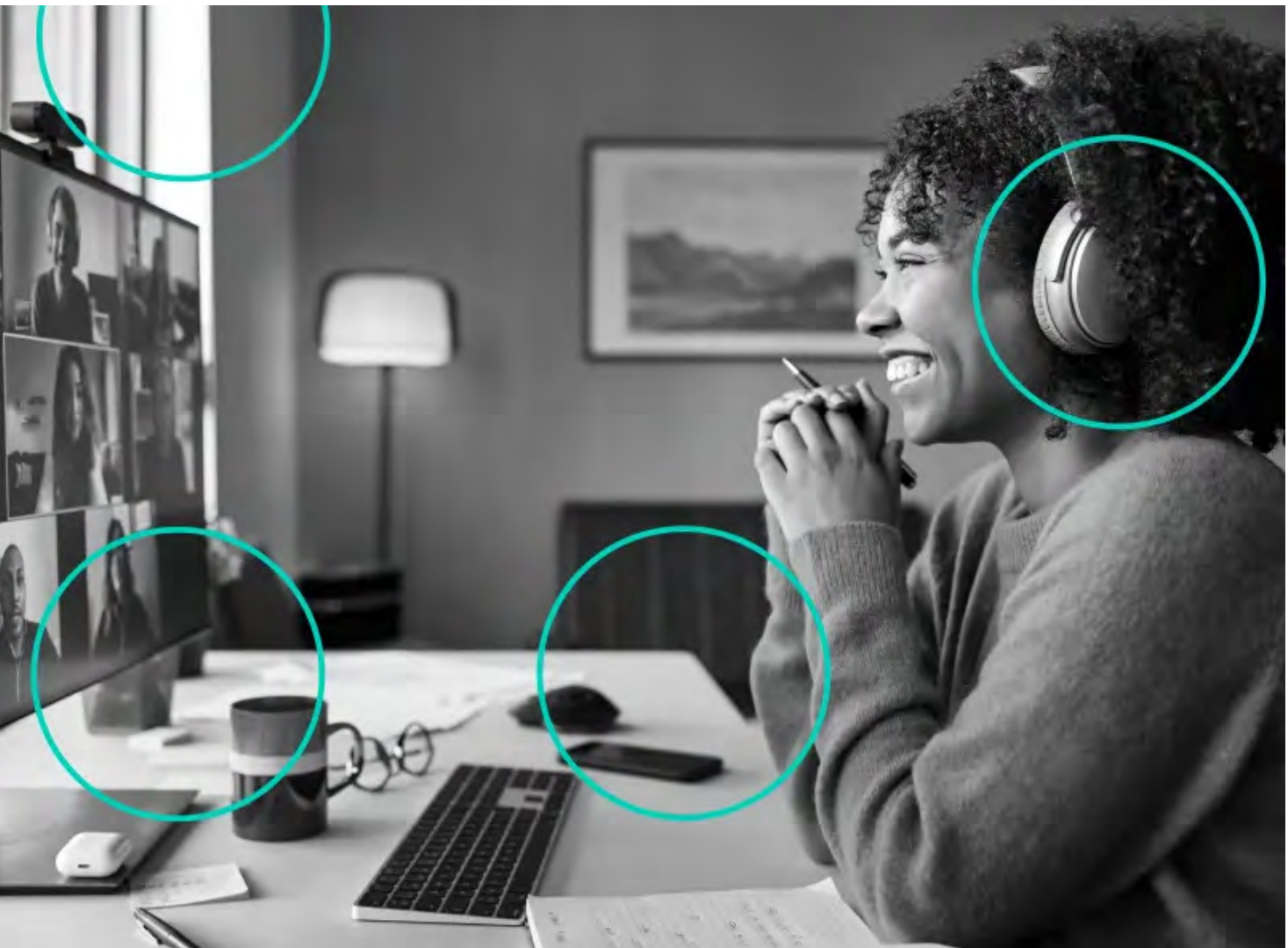
- Desktop CRM
- Stock Surveillance
- IR Website
- ESG Website
- Virtual Events
- Engagement Analytics

IRO NAME:

Luana Wolk

Summary

- As an innovative and growing software company powering the Subscription Economy®, Zuora® has been increasing its focus on enhancing investor relationships and expanding its outbound targeting efforts.
- With a small team, IR needed to expand the impact of its program given multiple competing demands and technology that didn't fit their unique program needs and business objectives.
- Zuora's IR team enlisted the help of Q4's suite of offerings and has been able to scale the time of its small team; especially during the busiest times of year.



Building Stronger Investor Relationships and Finding Untapped Opportunities

As a growing company with an innovative business, Zuora has been strengthening and expanding its investor and capital markets presence since going public on the New York Stock Exchange in 2018.

Early on, Zuora focused on providing billing solutions for subscription-based businesses. Since then, the company has expanded to serve as an intelligent hub that monetizes and orchestrates the complete quote to cash and revenue recognition process at scale. Zuora now has a multi-product portfolio including Zuora Billing, Zuora Revenue, Zuora Collect, and Zephr.

This growth and evolution in Zuora’s business drove a greater focus on more frequent shareholder and analyst engagement to ensure the capital markets understand and have confidence in the company’s investment proposition.

Zuora has built a strong and established base of current shareholders and expanding their footprint remains an ongoing priority.



Capacity Constrained with an Outdated and Cumbersome Vendor

With a small team, Zuora’s IR needed to further expand the impact and scope of their program given multiple competing demands.

The team came to realize they were in need of a holistic set of solutions to scale their time, reduce complexity of their day-to-day IR tasks, and focus on what’s most important.

Gaining access to CRM software that specialized in/ focused on what they needed to get the job done - collaborative support and strategic, insight-driven capital markets advisory - were the priority.

When exploring other solutions, the team quickly realized other IR providers focused on more complex solutions, requiring ongoing training with minimal

support, and had great variability in capital markets expertise. Q4’s was able to offer something unique. A CRM backed by the level of service one would expect from a leading IR partner, and an upgraded Surveillance solution that could be integrated for greater insight.

Since Zuora was already using Q4’s industry leading Website and Events solutions, it made sense to consolidate everything under one roof, simplifying contractual relationships and reducing administrative load while benefiting from Q4’s integrated model.



“ Q4 has enabled us to have more visibility and make IR a more strategic partner to our organization. ”

Luana Wolk
VP of Investor Relations, Zuora



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Working with Q4 saves us time and unlocks the capacity to focus on high value tasks so we can be a strategic IR partner to our organization. I would definitely recommend Q4 if you are looking for an intuitive IR CRM platform with robust support - and the added support was the main differentiator for me.

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Luana Wolk
 VP of Investor Relations, Zuora

Scaling the Zuora Team's Time and Impact

The connected value of Q4's simple, yet comprehensive Desktop CRM, the added level of support provided by Q4's team, and Q4's Surveillance expertise were the differentiators.

Working with Q4, Zuora has been able to scale the time of its small team, improve capacity during the busiest times of year, increase focus on building a broader shareholder base, and become a more strategic partner to leadership.

Q4 was able to provide meaningful impact by entering meeting notes and individual meetings in their CRM, producing key reports that link shareholder engagement, meeting activities, and ownership to highlight critical trading insight to their CFO. Each of these aspects provided scale to the IR team and enabled them to focus on other priorities. With Desktop and Q4's added layer of service, Zuora has also established more defined investor targeting cadences,

simplified how they prepare for non-deal roadshows and track market movements.

Zuora has been particularly surprised by how much the team has been able to achieve with Desktop.

The simplicity of the platform coupled with robust support meant that the team did not need to undergo extensive upfront or continuous training like their previous solution. Tasks that used to take hours can now be completed quickly and efficiently, allowing Zuora to focus on more strategic activities that are increasing the profile and impact of their IR team.

Making the switch to a new IR partner was not a consideration the team took lightly, but the Q4 team made the transition smooth and impactful.









About Q4 Inc.

Q4 Inc. is the leading provider of IR Ops software with the world's largest set of proprietary investor data, purpose-built to remove obstacles between public companies and their investors. Q4 gives investor relations leaders, C-Suite Executives and their teams the tools to attract, manage, and understand investors — all in one place. The AI-enabled Q4 Platform boasts applications for website and event management, engagement analytics, and overall lifecycle management, including AI Earnings Co-Pilot to generate draft scripts based on historical data, and AI earnings call summaries to understand peer sentiment. The Q4 Platform also includes a streamlined investor CRM and shareholder intelligence with enhanced metrics to elevate investor targeting strategies within the platform. Q4 delivers the data, insights, and workflows that give IR teams the power to focus on what really matters: strategy, relationships, and driving premium valuations for their companies.

The company is a trusted partner to more than 2,600 public companies globally, including many of the most respected brands in the world, and maintains an award winning culture where team members grow and thrive.

Q4 is headquartered in Toronto, with an office located in London. Learn more at www.q4inc.com.

-  q4inc.com
-  (877) 426-7829
-  sales@q4inc.com
-  [/q4tweets](https://twitter.com/q4tweets)