



# AI Glossary

Term	Definition	In the Context of IR
<b>Artificial Intelligence (AI)</b>	Technology that enables computers and machines to simulate human intelligence, including learning, problem solving, decision making and creativity.	Forms the foundation of modern IR technologies, enabling faster insights and enhanced decision support.
<b>Generative AI</b>	A subset of AI focused on creating new content, such as text, summaries, or images, by learning patterns from large datasets.	Supports IR by drafting communications, synthesizing external reports, or producing templated content.
<b>AI Agent</b>	A software-based entity that can take initiative and perform tasks independently, based on predefined goals and available context.	Functions like a digital IR assistant that prepares materials, monitors engagement, and provides timely recommendations.
<b>Agentic AI</b>	AI designed to operate with autonomy, context awareness, and goal-directed behavior, enabling it to take meaningful action without constant human input.	Supports IR teams by proactively completing tasks such as summarizing investor sentiment or generating meeting briefs.
<b>Autonomous Agent</b>	A type of AI agent that operates independently within defined parameters to achieve specific objectives.	Can take actions such as logging meeting outcomes, notifying teams of engagement shifts, or initiating next steps.
<b>Agentic Workflow</b>	A process in which AI agents participate as active contributors, completing steps in a workflow with minimal human intervention.	Enables IR teams to delegate recurring tasks, reduce manual effort, and streamline processes across investor touchpoints.
<b>Contextual AI</b>	AI that incorporates surrounding information such as historical data, prior interactions, and timing to inform its decisions and actions.	Helps ensure that AI-generated insights are relevant and tailored to the specific investor or meeting context.
<b>Goal-Oriented Behavior</b>	An AI capability focused on achieving a desired outcome rather than executing a single, isolated task.	Allows an agent to support broader IR objectives, such as preparing for a roadshow or maintaining ongoing investor engagement.





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Reactive vs Proactive AI	Reactive AI responds to user commands, while proactive AI anticipates needs and initiates actions aligned with user goals and context.	Proactive AI can flag engagement risks or generate investor summaries before they are requested, increasing efficiency.
Generative AI vs AI Agent	Generative AI produces new content based on data; AI agents use reasoning, memory, and goals to act on your behalf.	Generative AI might draft a statement; an AI agent would decide when and why to generate it, and whom to send it to.
Large Language Model (LLM)	An AI model trained on vast amounts of text data to understand and generate human-like language at scale.	Forms the backbone of tools that summarize earnings calls or generate draft responses in an IR-friendly tone.
Closed LLM	A large language model that operates in a controlled environment, typically with restricted access, strong data privacy protections, and no public training.	Helps ensure sensitive IR data is not exposed to external models or used to train future AI systems.

## 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 offices in New York and London. Learn more at [www.q4inc.com](http://www.q4inc.com).

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