



## Establishing a budget-friendly investor relations function at a new listed company

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Congratulations! Your company has just gone public – an important milestone. Now more than ever, your company is in the spotlight and investors are eager to hear your story. But how can you build a strong investor relations function from the ground up, especially with limited resources? I believe these basic points might be helpful in creating a roadmap for building a solid IR presence without breaking the bank. Remember that IR is multifaceted. The company's endeavor to go public requires internal stakeholders to understand the intricacies of a publicly traded company, while the promise you made when you went public needs to be repeated, understood and delivered on. There is a balance to be struck between internal and external tasks.

### Internal efforts: Laying the foundation

**1. Become the company whisperer:** The first step is to immerse yourself in the company's DNA. Understand the business model, growth strategy, competitive landscape and future plans. Make friends with key executives in all departments – finance, operations, marketing – and become a sponge for information. Visit them in person to build a relationship and maybe even ask to be included in senior management briefings (reports or meetings).

**2. Content is King, Queen, and Jester:** start creating compelling content. Use your internal resources – you do not need fancy designers! Develop an investor presentation that emphasizes your company's value proposition, financials and growth prospects. Use visuals and infographics to support your narrative and don't distract with too much text. Create FAQs (Frequently Asked Questions) that address the most common questions from investors. Think about questions that are likely to be asked by someone unfamiliar with your company's sector or niche.

Use existing marketing materials such as press releases and case studies and tailor them to your target investor audience.

**3. Harness the power of free websites:** There are excellent free website builders available. Set up a dedicated investor relations section on your company website. This should include all of the content mentioned above, including previous investor presentations, quarterly reports, press releases and upcoming events. While this is an option, you should have some budget available to make the section professional, as there are some guidelines and regulations that can be included. Look at award-winning company websites, compare yourself to other companies in the sector and see what other companies have published on their websites that you might find useful.

**4. Harness the power of communication tools:** take advantage of free video conferencing platforms to meet with analysts and investors. Use email marketing tools to distribute your content and updates to your investor base. Social media platforms such as LinkedIn can be a powerful tool for thought leadership and engagement, but be sure to comply with financial regulations.

**5. Inform and empower:** Conduct internal training for all employees – from account managers to CEOs. Sharing information about the intricacies of a listed company is extremely important for all employees, especially if they want to trade in the company's shares themselves or work in areas where internal information is presented to them and can therefore easily leak out. Employees who interact with investors or provide information to the public need to be trained to ensure consistent communication and promote a company-wide understanding of the importance of investor relations.

## External Engagement: Building Bridges

**1.Target audience:** Investors come in all shapes and sizes. Identify the analysts, portfolio managers and media representatives who cover your industry or similar companies. This will allow you to tailor your communications and engagement. Yes, if you don't have the budget, this is manual labor. Take an hour every day and dedicate it to building this kind of network where you can easily customize your communication.

**2.Network like a pro:** Take advantage of free resources like online investor conferences and industry webinars. Attend industry events (even virtual ones!) to connect with analysts and investors in person. Introduce yourself, tell your company's story and show your willingness to answer questions. IR companies around the world offer free information on their websites, white papers and webinars. Get on their mailing lists to stay up to date. (Be careful as this can clog up your inbox)

**3.Transparency is key:** Ensure regular communication with your investors. Issue press releases for important announcements. Create a schedule for quarterly earnings announcements and invite investors to attend and ask questions. Proactively address negative news or market volatility with clear, concise communication. Since going public, you already have a handful of investors invested in your company. Call them and let them know what news your company has to offer. (There is always information worth talking about)

**4.Building relationships takes time:** Building trust with investors is a marathon, not a sprint. Be patient, persistent and consistent in your communication. Be available for follow-up calls and emails to answer any questions investors may have. This is extremely important. Stay on the ball after the initial contact: you are a new company, help them remember your company, your story and your contact information.

**5.Measure, adjust and improve:** Track key metrics such as website traffic, investor inquiries and media mentions. Analyze your results and adjust your strategy accordingly. Look for free online tools that offer basic sentiment analysis to determine investor perception of your company.

**Remember:** building a strong investor relations function takes time, dedication and ingenuity. However, even without a big budget, you can make a positive first impression on investors by focusing on transparency, proactive communication and building genuine relationships. With a little effort and ingenuity, you can turn your shoestring budget into a springboard for investor confidence and long-term success. Remember that everything you are trying to do has already been done by someone before you. All you have to do is tune into the times and engage with the information that's out there.