

Six Tips for Managing Your Quarterly Earnings

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Another earnings season is upon us, and whether you're new to investor relations (IR) or a vet, preparing for and managing earnings can be stressful. From coordinating conference calls to ensuring the release is pushed to your website, it's not an easy time for any IR team, big or small.

Here are a few tips on how to better manage your results for a successful season:

1. **Leverage your partners.** Delegating responsibility across your team and partners will help your process. Who will send the release to the wire service? Who will confirm the release crossed the wire? Is that information pulling to your website? [Seeing all the preparation](#) in one place will give direction and leave little room for missteps.
2. **Keep your contacts in the cloud.** Keep all your partner contacts in one place that your entire team can access no matter their location. If an edit needs to be made to your presentation 15 minutes before your conference call, you do not want to be scrambling for a phone number. Call me old school, but it doesn't hurt to print those contacts out prior to earnings day as well.
3. **Know what kind of file types to use.** While you may want to save everything as a PDF and be done, PDFs can be difficult to pull content from and at times are not great for transferring tables across the wire or

onto a website. You may need to send your text in Word and the tables in Excel.

4. **Practice and have a backup plan.** Remember the time you procrastinated on that term paper only to have your printer flash “ERROR” minutes before it was due? Practice your earnings call. Remove the protection from the PDF. If you’re the only one with access to your conference call contact, see point 2. Make sure the WiFi in your conference room is accessible during your conference call.
5. **Slow down.** I’ve received multiple emails intended for other people. Check and double-check your TO: and CC: fields in your email. If there was only one story about a release sent to the wrong person or [discovered accidentally](#), this tip would not exist. In an autofill world, it happens.
6. **Seek out the wisdom of others.** IROs depend on their partners and peers for guidance. Organizations like the National Investor Relations Institute ([NIRI](#)) can connect you with other IR professionals who have done it all.

Our approach to earnings involves detailed planning for anything and everything. We take away the strain and ensure your event, large or small, runs smoothly. If you have any questions, please [contact us](#).