



NEWS RELEASE

The Evolution of the IR website: How to Future-Proof your Impact with Investors [Webinar Recap]

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In today's digital landscape, your website is the investment community's first port of call. In this light, the IR site is more than just a repository of financial information, it's also a window to your 'company's soul.' But as technology, the global market, and the modern investor continue to evolve, so has the IR website.

In a **recent webinar**, we partnered with IR Magazine to explore the trends that are shaping the way IR sites look, feel, and function. The panel of IR website experts included: **Joe Di Bacco**, Director of Client Activation at Q4, **Matt Tractenberg**, Investor Relations Partner at Q4, **Scott Payton**, Managing Partner at Bowen Craggs & Co, **David Phillips**, Head of Investor Relations at Hays.

The panel discussed everything from improving your site's accessibility, to leveraging microsites for ESG, presenting your company fundamentals, optimizing your site's design and functionality, and using out-of-the-box solutions. Here are a few essential insights, to help bring your brand to life for investors now and future-proof your site for tomorrow.

Web accessibility is a crucial trend

The topic of **web accessibility** is getting a lot of attention today. According to Matt, that's because nearly one in five people in the US and "more than one billion people worldwide" have a disability. They account for an integral part of the economy. He also points to accessibility becoming a key compliance area, with the rise of "significant



legislation in recent years and the release of international **Web Content Accessibility Guidelines.**"

Matt adds that accessible websites reach a larger audience. They have greater visibility, because being web accessible also improves your site's SEO. Google more strongly ranks websites using accessibility techniques in organic search, because search engine crawlers can't see or hear, much like people with disabilities. Besides all of these benefits, the bottom line is that demonstrating accessibility is "the right thing to do," and increasingly more institutions and fund managers are looking favorably on Socially Responsible Investing (SRI).

Joe agrees that being compliant for web accessibility is more than good practice. He outlines a few key tips to ensure your site is compliant with global standards:

- Make sure your site is keyboard accessible, so that users don't need a mouse for navigation.
- Design your site for intuitive navigation. Users should be able to tab through your content, in a way that follows the natural visual flow of a page (left to right, top to bottom).
- Limit automatic content, like pop-ups and scrolling.
- Provide alternative ways to consume content, such as closed captioning for video content and text transcripts for images.
- Add "Alt Text" to provide users with a text based description for videos and images.
- Use high contrasts between colors, text, and backgrounds.
- Make text highly legible (clear letters) and readable (clear text blocks).

Scott adds that "accessibility is good practice for everybody, not just for those with disabilities." He explains that "if you make your website accessible, you'll improve usability overall." When it comes to online investor relations, he looks to one golden rule: "provide quick and easy access to the key information and tools that investors and analysts most want."

From his experience, intuitive navigation is where many IR sites fail. He advises clients to think about navigation like the break and accelerator pedals in a car. "Put them where people expect them to be." When it comes to visuals and value added content, be innovative. But for navigation, "be boringly conventional. It's the foundation of good usability for everybody."

Leveraging microsites for ESG investors

Hays recently created an **Acting Responsibly microsite**, which they integrated with their investor site, with the goal of "putting their reputation of acting responsibly front and centre." According to David, it was important to showcase their ESG initiatives "at the heart of their PLC website, because it's at the heart of their company."

Scott points to Bowen Craggs & Co's survey on "why investment professionals come to an IR site." They found that

“investors are just as likely to come to your site for information about your company itself as to get financial data.” This underlines the fact that “it’s crucial to integrate your IR section with your corporate online presence.”

The key takeaway here is that “investment professionals want qualitative information from the horse’s mouth,” or in other words, a real look into the goals and strategies of your company. “With the rise of ESG and other specialist issues, a holistic approach to online corporate communication is more important than ever.”

David agrees about making a stronger impact with your corporate story online. He recommends using video to bring your value proposition to life, and to clearly and concisely “explain what your company does” with as much “long term data as possible.”

Making the most of website real estate

For David, “making the most of your website real estate” is essential. He advises IR professionals to consistently look at their analytics to prioritize which parts of their website are prime real estate” and to “think about how investors and stakeholders can access key information in as few keystrokes as possible.” He adds, “if a piece of content isn’t getting clicks, move it or replace it.”

Having recently redesigned the **Hays’ investor site**, David emphasizes the importance of looking at your Google and web Analytics, “to understand which parts of your website are being frequented most” and to spot “buried data.” One of their first discoveries was that their users were taking 3-4 keystrokes to get to key data like dividend payment dates and historic amounts. With this insight, they “implemented a mega menu with five headings and a drop-down menu, so users can now get 40+ captions with one keystroke.”

The look and feel of IR sites today

Matt says that it’s crucial for an IR site to be “visually pleasing and easy to navigate.” That’s because, “when it comes to IR, a website is one of the most crucial platforms to educate and engage the street about your offerings and differentiate yourself from your peers.” Investors need to quickly identify and easily digest your value proposition and performance metrics.

Since IR sites tend to be data heavy, your content “needs the space to breathe.” Matt advises “guiding your users through your story and delivering an uncluttered experience.” He looks to **design as the key** to “capturing a user’s attention” and “communicating not only efficiently and intuitively, but also creatively.” Build a website that “conveys your brand’s personality and delivers an experience that’s clear and engaging.”

Joe weighs in on making the most of design for your IR site: “While it’s important to factor in the nuances of an investor audience, all of the fundamental principles of good web design still apply. It’s crucial to follow best practices for site structure and develop your investor focussed content.” He shares three essential

recommendations:

- Create an intuitive design, by simplifying navigation and structure, grouping related content, and prioritizing information. Make it easy for a user to move through your site and find what they need quickly.
- Be visual and interactive. Create an engaging experience which reflects your company's brand and identity. Use video to share messages from your CEO and present your business objectives. Give investors a dynamic visual picture about investing in your company with eye-catching icons and animated graphics. Capture attention on your landing page with full screen banner images and integrated looping videos.
- Tell a story, don't just present a roster of documents. Create a "Why invest" page or section to succinctly convey your value proposition, leveraging infographics and/or animated charts. "Just because you're presenting numbers and reports doesn't mean you're limited in creativity."

The increasing popularity of "out-of-the-box" solutions

Matt says that there's been a significant shift in the marketplace: "We're starting to see more and more companies, across sectors and market caps, opt for an **out-of-the-box solution**." While at first, the idea of using themes or templates might sound a little counterintuitive, "today's turn-key solutions are built using best practices in design and IR... and are branded to match corporate identity." And all of this can be built in as little as two weeks.

For him, an out-of-the-box solution also addresses "our limitations as IROs." He explains, "when I was an IRO, I was often just trying to keep up, putting out fires all day long. So many investors and sell-side analysts to speak with." A "turn-key solution" enables IROs to focus on their day jobs, while still delivering a website that's "anything but off-the-shelf." Matt connects this with his belief that "today's IROs **need a partner they can trust** to deploy best practices...When I was a Q4 customer, I could put my IR site in the hands of a trusted partner and their website expertise."

Joe adds, "today, technology enables us to give our clients greater choice in their website solution." For an increasing number of Q4 clients, that choice is to leverage a quick and efficient solution, instead of "a fully bespoke experience," which was more popular in the past. He advises clients to no longer associate themes or templates with 'cookie-cutter' websites of the last few years: "The reality is that we're now able to offer all of the benefits of a template, which include less client effort, quicker turnaround times and lower costs — all the while providing a flexible, fully branded and highly interactive experience, with all the best-in-class features that investors come to expect."

He explains: "IROs simply don't have the full bandwidth to devote to a website design project. Our theme based websites provide exactly the same level of compliance, accessibility, responsiveness, and features, in a ready-to-use solution that requires minimal time and client input to go live."

Joe cites the example of a well known food service brand. Despite being a large company, their IR team was comprised of three thinly spread professionals. Budget was also a concern, with other major corporate initiatives underway at the same time. A theme-based solution enabled them “to produce a fully compliant, vastly improved IR site that was aligned with their brand standards,” with an “overall process [that] required fewer decision points and much less commitment of their time.” On that note, Joe concludes: “Their story illustrates the quality and flexibility of theme based solutions that have evolved with the market.”

Missed the webinar? **Watch it now, on demand.** For more information about optimizing your IR website design, **download our best practice guide.**

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