



PRACTICAL GUIDE

Conducting Virtual Corporate Access Meetings and Events

OpenExchange’s community-based video solution enables portfolio managers and analysts to communicate more quickly and effectively with company management teams around the globe. Through a simple-to-use interface, the buy side, sell side and corporate issuers can arrange and conduct one-on-one and group meetings using secure, private, high quality video.

OpenExchange, leveraging its web-based video platform, has partnered with a select group of innovative banks to execute a series of virtual corporate access meetings and events in the past several months. As you develop new opportunities for your clients, realize that you’re no longer held to time or geography – a virtual event or conference is a proven way to do additional meetings.

How it works

These meetings can be whatever they need to be: sector focused, regional opportunities, new analyst coverage, etc. Based on the needs and desires of your clients, arrange meetings between investors and companies over the course of a morning or afternoon using OpenExchange, without having to travel:

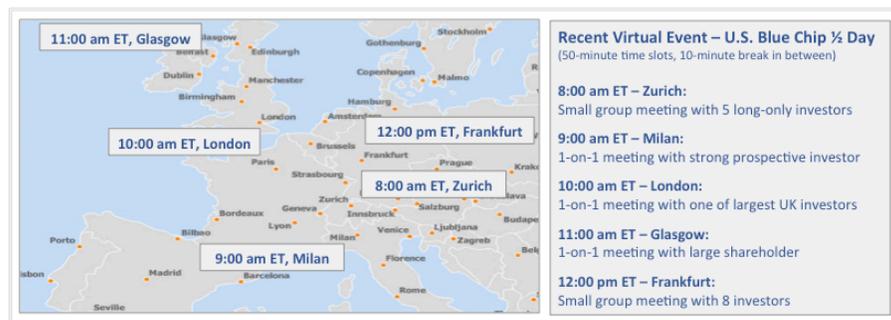
- Schedule meetings in consecutive 45-50 minutes slots
- Q&A format; some may start with brief introduction
- Arrange meetings for one or more companies/investors
- Bank arranges logistics for participating organizations
- Analyst plays vital role in introducing participants/topics

Getting started

Here’s how you can create and execute a virtual event tailored to your specific needs:

- Step 1 – Speak with your client and decide the focus of your effort (sector, company-specific, region, etc.)
- Step 2 – Invite investors and companies to participate
- Step 3 – Build out schedule
- Step 4 – Execute event

Recent virtual event



To learn more about how you can design and execute virtual events tailored to the interests and needs of your clients, contact OpenExchange at sales@openexc.com or +1.617.600.6270.