



Be a SuperhIRO!

When plans change at the last minute, OpenExchange can help save the day.

When last minute news or unexpected business changes your travel plans to meet with investors, OpenExchange can help save the day!

We all understand that investor marketing events are planned many months in advance. It's a major challenge to align executive schedules with the increasing requests for NDRs and conferences. Once you have your executives locked in, there is still the chance that your CEO or CFO might cancel at the last minute because "something important came up." This is where OpenExchange can be a great tool to help save the day (and your relationship with the investment community).

The IRO as superhero

The head of investor relations at a mega-cap healthcare company experienced this exact situation. Months in advance, the IRO had planned a marketing trip to Boston with her CEO and CFO. When this trip was only days away, the company was prepping to make an announcement about a major vaccine development. The night before the marketing trip began, the press release went out and the IRO and her CFO headed to Boston. Meanwhile, the CEO stayed behind to tend to the financial media and discussions with the health authorities, expecting to leave the next morning and arrive in time for the meetings. Unfortunately, Mother Nature did not cooperate and caused major flight delays, requiring the CEO to remain at company headquarters.

This is where the IRO jumped into her hero mode. She knew the Boston investors were eager to meet with her CEO, particularly with the just-announced vaccine news, and she did not want to disappoint. And, it would be impossible to find another day in her CEO's calendar to bring him back up to Boston any

time soon. The IRO and her team called on OpenExchange to help arrange for the CEO to join the meetings over video, while the IRO and CFO were on site at the investors' premises. The OpenExchange team diligently coordinated the meetings with the hosting sell-side bank so that the IRO and CFO were seated simultaneously as the CEO came on the screen.

It was a great success: the CEO was still able to deliver on his commitment to meet with investors face-to-face and tend to critical business in the office as well. According to the IRO, "It all went totally seamlessly from my end with the investors. The video meetings enabled [the CEO] to meet both very important commitments."



OpenExchange saves the day

Not only is OpenExchange a valuable tool to increase your activity with investors, it also can help keep the promise to them that you will deliver management. This mega-cap healthcare company IRO is a strong believer in integrating video meetings into your IR strategy. In the past she has commented that, "Virtual meetings now account for 15% of our roadshow activity. Our executives love it. It saves them time and lets them get to smaller or more geographically diverse investors. If an investor wants to talk about a particular segment of our business, we can bring that investor the leader of that business segment."

Put OpenExchange in your IR toolbox – it can help build lasting relationships with investors and make you look like a superhIRO too!

To learn how OpenExchange can help you be a SuperhIRO, please contact us at:

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