

Investor Days: Top 10 Lessons Learned

An investor day is a complex event with many moving parts. These 10 tips from IHS Markit will ensure your next event goes flawlessly from start to finish.

1. Start MUCH earlier.

An early start sets you up for success. Plan to book the venue 9-12 months in advance and start prepping a minimum of 3-4 months ahead.

2. Set clear objectives.

Accountability is key, so identify your priorities and set KPIs that enable you to measure your performance.

3. Engage every executive.

An investor day requires the entire executive team—not just the CEO and CFO—to be ready to present on their long-term business targets.

4. Avoid scheduling conflicts.

Ensure your event doesn't overlap with industry conferences, roadshows, or competitors' investor days. If possible, coordinate with other IR teams to avoid conflicts.

5. Keep presentations short.

Craft succinct messages and limit presentation time. Aim for presentations that cover the key points of each business without going too far 'into the weeds'.

6. Leave time for Q&A.

Q&A can be as important to investors as the presentations. Leave time for investors to ask questions and dig into the details.

7. Keep it lively.

Fireside chats, group Q&A sessions, and panel conversations are great ways to break up the day and avoid an over-reliance on PowerPoint-driven presentations.

8. Focus on the long term.

Save the quarterly and annual goals for earnings, non-deal roadshows and conferences. Investor days should focus on medium-to-long-term (3-5 year) goals.

9. Provide executive training.

Senior executives who are used to presenting internally will need coaching and Reg FD training to help them communicate effectively and appropriately with investors.

10. Conduct full dress rehearsals.

Simulate the real, on-site conditions as much as possible. Conduct 1 or 2 dress rehearsals on site, complete with audio-visual equipment.

IHS Markit's Investor Day Advisory has helped more than 150 clients execute successful investor days.

For more information, IRinfo@ihsmarkit.com or visit the [website](#)