

Evaluating IR Website Partners

New Vendor Checklist



As an investor relations professional, communicating effectively with investors and stakeholders is imperative. Timely and accurate updates and postings can be stressful and manual. The checklist below is designed to help you make an informed choice, allowing you to then focus on telling your best investment story. Secure a partner who has all the best practices—not just another vendor.

1. Single, Consolidated Solution:

- Can the provider manage your IR website, press release distribution, regulatory filings, earnings call and investor days as a one stop solution?
- Do they offer automatic updates to your IR website?

PRO TIP: *Because timing is critical and resources are spread thin, making your workflow as efficient as possible is key to a successful earnings reporting cycle.*

2. Customer Support:

- Will you know your support contact by name? Will they be available to address your company's needs?
- What is the average tenure of their support staff? Do they have a deep understanding of investor relations communications?
- Is there a global, expert IR service team available 24/7/365 for when you need them most?

PRO TIP: *Don't get stuck chasing separate vendors and escalation paths.*

3. Functionality and Features:

- Can you tailor the website to reflect your company's branding, messaging, and visual identity?
- Does the provider support microsites to showcase investor days and highlight ESG initiatives?
- Do you have access to a comprehensive set of features such as financial data integration, SEC filing access, news updates, and events calendar?
- Does the platform support responsive design for optimal user experience across devices?

PRO TIP: *With more stakeholders involved in IR communications, look for a provider who is an expert in the IR workflow, with the flexibility to meet the goals of your larger brand, design and communications story.*

4. Security:

- Does the platform offer enterprise level security and multi-factor authentication (MFA) for a layered approach to keeping your communications safe?
- Does the provider prioritize data security including encryption, secure file upload, and robust protections against cyber threats?
- Is the platform compliant with relevant data protection and privacy regulations (e.g., GDPR, CCPA)?

PRO TIP: *Make sure the platform you are considering has a long history of a stability, reliability and security.*

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5. Accessibility and Compliance:

- Does the platform adhere to accessibility standards, making it usable by individuals with disabilities?
- Is the platform built and managed with regulatory compliance at the forefront?

PRO TIP: Does the provider understand the nuances of accessibility and compliance? Take, for instance, SEC filings, which are inherently not yet compliant with accessibility standards. Open and honest communication around limitations and an understanding of standards and best practices is crucial for getting accessibility right.

6. Scalability:

- Do they offer appropriate language support, features and functionality for your global audience?
- Can the platform accommodate your company's growth and increasing traffic without compromising performance?

PRO TIP: Confirm pricing tiers or plans align with your growth trajectory.

7. Analytics and Reporting:

- Is the provider able to identify prospects visiting you IR website so you can conduct more relevant outreach?
- Can they identify potential activists to help you with risk management?
- Does the platform provide robust analytics tools to track user engagement, traffic patterns, and content performance?
- Are there reporting capabilities that allow you to generate insights for stakeholders?

PRO TIP: Work with a provider who prioritizes their roadmap based on IR customer feedback. Be confident in continued investment, built for the IR use case.

Notified's integrated IR solutions and 24/7 support let you manage everything through a single partner. We support news distribution, regulatory filings, earnings calls and webcasts, investor days, IR websites, ESG communications and more.

