



IHS Markit®

# Investor Day Timeline Checklist

The following is intended as a general guideline for the timing of various steps in the process to ensure you can plan and execute a successful Investor Day:

## 9 to 12 months prior

- Finalize budget for event  
(include in prior year planning process if possible)
- Select a target date and time
- Reserve venue (ideally 12 months in advance)
- Reserve hotel block of rooms (if applicable)
- Block executive calendars for the event

## 5 to 6 months prior

- Kick off meeting with team/advisors to align on process and schedule key dates
- Finalize speaker list
- Identify any other executives required for sessions including Q&A, break-outs and luncheon
- Block time on executive calendars for all event and prep sessions
- Draft KPIs for the event  
(informs Perception questionnaire)
- Draft key messages  
(informs Perception questionnaire)



## 4 to 5 months prior

Conduct pre-event perception study to understand market expectations/begin to formulate communications strategy

## 3 to 4 months prior

Perform targeting analysis to finalize invitation list

Send “Save-the-Date” (including hotel arrangements, timing and other logistics)

Press release announcing Investor Day

Sign-off on KPIs for event (incorporate Perception findings)

Finalize key messages/themes (incorporate Perception findings)

Align on agenda for the event

Begin Investor Day slide production

## 2 to 3 months prior

Send out invitations

First draft of investor presentation

First draft of Q&A document

Go live with event website/portal

## 1 to 2 months prior

Final draft of investor presentation

Final draft of Q&A document

Manage RSVP process

Send any additional invitations (if more available spots open)

## 2 to 3 weeks prior

Legal/Compliance review of all documents

Investor presentation finalized

Q&A document finalized

## 1 to 2 weeks prior

1st Dry run of presentation / Q&A rehearsal / executive coaching

Prepare all executives for Reg FD issues

Prepare event day press release to be sent morning of Investor Day

## Final week

Final onsite rehearsal – entire presentation / Q&A / executive coaching

Finalize gift bags / giveaways / nametags for event

Prepare press release to be sent in a.m. of Investor Day

Test of all onsite technology including AV equipment and webcast provider

## Day of event

Send out event day press release early a.m.

Manage all attendees (executives, guest check-in, employees, etc.)

Manage all logistics (AV testing, vendors, seating, etc.)

## Days/weeks following of event

Conduct post-event Perception Study to gauge market sentiment on strategy delivery and communication

Monitor buying and selling patterns of attendees and include in board reporting

Prepare board report summarizing event, feedback and changes in positions

Leverage the learnings from Investor Day in formulating IR plan for next 12 months

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