



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, luncheon
- Block time on executive calendars for all event & 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, 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, 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