Why Meetyl® Should Be Part of Your Investor Strategy

Utilizing Technology To Increase ROI on Investor Relations

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Meetyl Inc.

## Why Meetyl Should Be Part of Your Investor 2015 Strategy

Secular changes in financial services driven by market volatility and trading technology have continued to erode the profitability of traditional full-service brokerage models. While research boutiques continue to spring anew, research coverage on an overall basis has continued to shrink over the past few years with a number of larger size full-service research firms and investment banks now merged or extinct. With less industry resources and rising investor marketing requirements, company executives and investor relations officers have to invest more time actively managing their investor marketing effort.

## Utilizing Technology To Increase ROI on Time and Costs

Technology is delivering clear value at the trading level today by improving access to liquidity and reducing trading costs for institutional investment funds. Similarly, technology should improve the investment process for these investment funds, particularly on the high cost fundamental due diligence component of management access. Immediate benefits include enhanced access and reduced costs for institutional investment funds.

Traditional marketing channels available to companies today provide relatively inefficient access and lack transparency. Companies oftentimes are underserved and investors pay high costs for access to management teams and information. An alternative approach to the management access function is needed whereby investors and companies can mutually benefit from having more relevant real-time information about each other.

## Benefits of Leveraging Technology to Provide Information

Research on investor relations has shown that a good portion of the task of identifying investors focused on companies with a similar market cap or that have a particular industry focus is not difficult. However, “the process can be tedious – even when utilizing available computer-based targeting products” as noted by Paul Vitek in IR Update. On the opposite side of the coin, investors (portfolio managers and research analysts) are constantly on the hunt for new and unique investment opportunities. By applying sorting algorithms to filter through the information gathered, technology can provide relevant data that is accessible via the cloud to solve the information needs of both sides.

Control and transparency are other major issues that exist when relying on a third party for information. Information provided through software could allow access to real-time information for company representatives such as CFOs and IROs to control their marketing process from start to finish or complement existing services to provide a more comprehensive marketing schedule that minimizes conflicts. Companies have to acknowledge that relying on a third party oftentimes brings conflicts of interest whereby the third party’s primary goal may be to maximize their own profits through trading revenues or other means.

## Growing Your Target Audience Beyond Traditional Channels

Company management and Investor relations professionals are being asked if they are getting enough introductions to expand their investor base. Oftentimes, the same research and brokerage firms that cover these companies are dealing with the same clients year after year. Therefore, company representatives are spending their marketing time with the same group of institutional investor clients that have relationships and can afford to pay trading commission dollars with these research firms. Another common occurrence is that research and brokerage firms, particularly those on the boutique or regional level, have limited reach and therefore, marketing trips or calls through these intermediaries may not result in the optimal selection of institutional investors. Lastly, we think a number of relatively large AUM asset managers are being left out of the traditional marketing channels of research firms, namely RIAs and family offices that in total are estimated to manage well over $1 trillion in assets just in the United States alone.

**A comprehensive investor marketing solution should allow:**

* Access to all interested investors, including funds that fall outside of traditional marketing channels of research and brokerage firms
* Priority to those investors who are existing shareholders or have the highest potential to invest
* Analytical feedback and internal communication system to track and determine ROI on time spent marketing

## Looking Ahead – A Meetyl-Enabled Marketing Effort

With proper information, software technology can provide for superior matching capabilities that can be used to improve process efficiencies and visibility throughout the investment community. In addition to being able to sort best-fit meetings & calls, Meetyl’s software has the potential for streamlining processes and improving communication among all parties in the investment community. As membership increases, the software can be leveraged to reduce costs and increase time ROI for companies and institutional investors alike.

**For IR officers and company executives who interface with Institutional investors, Meetyl has the potential to provide the following benefits:**

* *Access* investor contact database with a growing list of curated, live investor users
* *Expand* investor base to groups beyond traditional marketing channels
* *Control* and prioritize targeted investor meetings and calls
* *Schedule* best-fit meetings based on relevant information and interest level from investors
* *Gather* analytics to maximize ROI on time and costs spent by company on marketing

**For Institutional investors such as Portfolio managers and Investment analysts, Meetyl can provide the following:**

* *Search* and access to company representatives based on relevant interests and criteria
* *Communicate* interest level to companies of focus through a private and secure channel
* *Discover* new investment ideas with the help of sophisticated matching algorithms
* *Engage* with companies based on interest level, not ability to pay for meeting
* *Maximize* ROI on time and costs by receiving relevant invitations directly from companies

## Questions to Ask Before Settling On Your IR Strategy for 2015

ROI on time and investment is top-of-mind for IR officers and company executives today. Here are questions to consider before planning your marketing day:

1. What primary challenges exist today in attracting additional investors?
2. What IR tools are in place to improve efficiency and reduce costs?
3. How can the impact of marketing days be improved?
4. Are the traditional marketing channels providing maximum reach to all potential investors?
5. What tools exist today to assist investors to provide benefits to all parties?

## How Meetyl® Can Help

Meetyl’s cloud-based platform delivers real-time visibility into company and Institutional investor needs to provide for better, more cost efficient and timelier communications. Our scheduling software leverages the cloud to allow users to search for investors and company management teams based on availability, geographic location, industry, and company specific interests.

Meetyl firmly believes that technology has the potential to significantly improve transparency and control for the investment community. With the addition of sorting features and analytics, Meetyl software can be a key component of your 2015 investor relations strategy. For more information on Meetyl, go to [www.meetyl.com](http://www.meetyl.com) or email [info@meetyl.com](mailto:info@meetyl.com).