



7 Steps to a Successful Earnings Call

Produce earnings calls that impress investors

Your earnings calls are a chance to connect with investors, educate analysts and tell your business's story. With these 7 steps, you can get the most out of each call.

- 1. Research:** Current events and market issues may cause stakeholders concerns. Brainstorm some of the questions you expect to hear and draft answers ahead of time. Understand what's occurring and how it might impact your company.



- 2. Create a script:** Poor word choices in an earnings call can cause stocks to drop and damage your company's credibility, so don't shoot from the hip. Instead, create a script that discusses what you want to cover and ensure your information is accurate.

- 3. Involve your CFO:** Select some numbers you want to highlight, and have your CFO give them context. Intelligent investors will appreciate deeper analysis and insight.



Q&A

- 4. Plan for the Q&A:** If you don't have many relevant updates, give extra time for questions. Ensure you're giving more air time to key concerns and not wasting it on irrelevant queries from short sellers or inexperienced investors.

- 5. Select a format:** Instead of a phone call, turn your [earnings call into a video](#). Creating a modern, slick production will increase the company's image and help you connect with investors.



- 6. Ensure accessibility:** Earnings calls are essential touchpoints for your most valued investors. Improve access by offering [captions and transcripts](#) of calls. Many prefer these formats, and others, including those who are Deaf or hard of hearing, rely on them.

- 7. Post your recording:** Your investors are busy. Post your call recordings in convenient places. Publish a video of it or [post it as a podcast](#) with the appropriate accommodations to ensure everyone has easy and equitable access to this content.



Verbit serves as an essential partner to members of the financial sector who are working to extend their reach and build inclusive brands. [Contact us](#) to learn how we can help you improve your earnings calls, as well as grow your audience and meet your investors' needs.