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FORMAT SHOULD FIT FUNCTION

by Bruce Frummerman, Frummerman & Nemeth Inc.

When you're tasked with creating print materials for presentations, one of the first decisions to make is a tactical one; which type of marketing piece would be the most appropriate choice for communicating the content your executives need to deliver to a selected audience.

Match Your Tools to the Communications Objective

There are a handful of key document types in your IR communications tool kit. Aside from the tools used for reporting event-driven news and SEC-required communications—news releases, quarterly letters, and the annual report—the IRO produces other types of marketing collateral. We can classify them into two broad categories:

- **Horizontal**, such as bullet-point flip charts; and
- **Vertical**, such as background fact sheets, white papers, and brochures.

The trouble is, some formats are frequently misused—and others are underutilized. The horizontal format of flip chart documents is typically the better choice for communicating data-based information. Text-heavy information, on the other hand, is better absorbed by readers when presented in a vertical layout of sentences and paragraphs.

Get Consensus on the Type of Collateral to Create

Wouldn't it be useful if you could guide your executive team toward selecting the correct tool for the job, thereby allowing you to craft the type of marketing collateral most likely to support their communications objective?

Before going through the time, effort and expense of copywriting, designing, and producing the wrong type of marketing piece for the job at hand, ask your executives these important questions about content and purpose:

- Is the majority of the information you have to communicate in the form of charts and graphs? Or, is it in sentence and paragraph form?
- Will the document serve as a visual aid supporting a verbal presentation? Or, is it meant to work as a stand-alone piece that communicates the full story the company has to tell about some topic?

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An answer of “Yes” to the first question means a flip chart/slide presentation is needed. An answer of “Yes” to the second question tells you that a different type of document is needed — one that is written in complete sentences, not in the bulleted form used to support a verbal presentation. A “Yes” to *both* questions means that *two* documents are needed — a visual aid and a more detailed leave-behind piece.

If your company has requested the wrong communications tools for IR tasks in the past, going through this process a few times with your executives and staff should help them make smarter decisions and allow you to produce better work.

Score More Communications Goals

There are two additional side benefits from asking questions before beginning creation of a requested marketing piece:

1. You’ll increase the odds that readers of your marketing collateral will absorb what your company has to communicate; and
2. You’ll reduce the odds that your audience will mess up retelling what you communicated when they discuss your company with their investment committee, peers, associates and customers.

Start each IR collateral development project by first identifying the right type of marketing document to create, and you’ll achieve these communications goals.

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