The Art of Financial Communications

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In today's complex and even hostile investor environment, a company can no longer rely on performance and strategy alone to connect with investors. No community is more critical, analytical, or hungry for information. Investors want to satisfy their voracious appetites for proving to themselves their portfolio is stable and growing. Investors come from financial institutions, business brokerages, personal investors, and financial advisers each of whom demand different communications techniques and presentation styles. Up until recently, investors only cared about seeing the numbers which were then supported by management strategy.

Times have changed.

Mastery of those audiences gives the broader financial community a picture of a single, coherent organization that is dynamic yet dependable. By anticipating questions and offering concise direct answers before they are asked is how you maintain control. Base your story rooted in strength and clarity. An engaging investor relations brand delivers focused, consistent messages. Effective messaging requires the ability to straddle the worlds of both finance and communications. To be effective, critical messages to the investor audience must be deployed in the context of an overarching story, or brand.

For example, an orthopedic urgent care brand that markets primarily to consumers also needed to develop an "investor relations" brand. The brand is built on the healthcare quadruple aim: better outcomes, lower patients costs, improved patient experience, and improved physician experience. Value based care is the future of our healthcare system today which is not the primary concern to investors. Therefore, they also developed a second investor relations brand that tells a compelling story about the company’s unique business model, physician network and the financial, marketing and logistics advantages that they offer.

The brand was deployed in an investor video, on the company’s investor website and in the talking points of every presentation made by the company to investors. When management meets with potential investors, they have an ingrained perspective on what the company stands for and what its long-term “value proposition” is for investors. Consumers see the brand in their neighborhoods and think “convenience and affordable specialty care”. Investors see ROI and think “scalable distribution platform.” Two different – and largely unrelated brands – for two different audiences.

Here are five tips to define your strategy when creating your brand message:

1.) Determine your target audience. Begin with the end in mind. Clearly define who you are talking to before even starting to design a strategy. From age to personality profile, understand their motivations and non-negotiables, define demographics and psychographics. Until you have personified your target audience as a real person, don’t even think of moving to step two.
2.) Specify Objectives. Your goals should be specific, measurable, achievable, results-focused and time-bound.
3.) Avoid over-reaching. Focus is critical. Have no more than three goals in a given plan.
4.) Get feedback before you launch. Always seek opinions from outsiders before launching.
5.) Test, measure, and adjust. Embrace the fact you are never

done. Always strive to improve results based on measuring your success and outcomes.

About the Author: *Christine has over 25 years of quantifiable executive management and franchise related leadership experience within the US and internationally with notable franchise startups in the service, technology, retail, food, health and wellness, financial service, medical care, technology and professional services.*