THE GLOBAL STANDARD:
A TOOLKIT FOR INVESTOR RELATIONS OFFICERS

IR Website Guide

Presented By

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Overview

This toolkit defines the global standard for IR website content and governance. It sets out what to publish, how to structure it, and how to maintain it so investors can underwrite the business with confidence. Inside you'll find practical direction on core pages, KPI presentation, earnings materials, governance disclosures, ESG content, events, FAQs, and archiving, with a consistent focus on clarity, consistency, and modelability.

Designed to help IR teams operate the website as a reliable investor reference that reduces confusion, supports valuation analysis, and ensures disclosures remain coherent, accessible, and defensible across cycles and audiences.

1 What is the strategic purpose of the IR website today?

The IR website is the company's always-on, globally accessible source of truth for the investment case. Investors use the site to validate definitions, retrieve materials, and resolve confusion quickly.

The site should be structured around underwriting needs—how the business works, how value compounds, and what to watch—supported by fast updates, stable KPI libraries, and rigorous version control.

The global standard
Treat it as a product that reduces uncertainty, improves modelability, and ensures fair access to information across regions and investor types.

2 What does "best-in-class" IR website architecture look like?

Best-in-class architecture is investor-journey designed, not corporate-org designed. Investors value speed and clarity more than aesthetics.

Organize content around model-building tasks, standardize naming conventions, and ensure every page is consistent in definitions and dates so the site functions as a durable reference.

The global standard
Clear paths for "Start here," "Results," "Presentations," "Financials," "KPIs," "Events & replays," "Governance," and "FAQs," with minimal clicks to reach core assets.

3 What should be on the "Start here" page?

The "Start here" page should enable a new investor to underwrite the business quickly. Investors want an on-ramp that is usable in minutes.

Keep this page updated every quarter, ensure it mirrors the messaging framework, and make it the anchor link you share in targeting and outreach.

The global standard
A concise investment thesis, a business model explainer, a KPI scoreboard with definitions, the latest deck, recent earnings materials, and a "what to watch" milestone frame.

4 How should we present KPIs on the IR website?

KPIs should be presented as a governed library, not scattered across decks. Investors punish KPI drift and reward consistency.

Publish a stable KPI scoreboard, provide downloadable time series where feasible, document any historical changes with bridges, and ensure the exact same KPIs and definitions appear across releases, decks, and transcripts.

The global standard
A dedicated KPI page with definitions, calculation methodology, multi-quarter history, and clear linkage to financial outcomes.

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What is best practice for posting earnings materials and timing?

Speed and completeness are the standard. Investors rely on the site during volatile windows.

Use a publishing checklist, automate where possible, and ensure global accessibility with no broken links, because missing or late materials increase confusion and volatility.

The global standard
Post the release, deck, prepared remarks (if used), transcript when available, and replay links as quickly as possible, with consistent file naming and clear date labeling.

How do we design the website to support modelability?

Modelability improves when investors can find drivers, assumptions, and history without friction. Investors want to translate narrative into assumptions.

Provide a "model drivers" page or one-pager, include key sensitivities where appropriate, and ensure materials are consistent and searchable so analysts can build and update models efficiently.

The global standard

Include driver explanations, segment context, KPI history, and clear capital allocation policy alongside financial statements and filings.

7 How do we prevent the site from becoming a dumping ground of PDFs?

A PDF library without structure increases friction and reduces usability. Investors need to know what to trust first.

Curate the top assets, use consistent templates, add short descriptions for key files, and maintain an archive structure that is searchable without overwhelming the main experience.

The global standard
Curated navigation with summaries, clear labeling, and a small set of canonical "current" documents supported by archives for history.

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What is the best practice approach to the Events & Webcasts section?

Events should be replay-native and globally accessible. Investors often consume events asynchronously.

Standardize event pages, keep replays available for a meaningful duration, and link the "what to watch" milestones to event content so the site supports long-term monitoring, not just live attendance.

The global standard
Every event has a page with the deck, replay, transcript (when available), and key takeaways, posted promptly and maintained reliably.

ESG should be presented through materiality and measurable governance. Investors discount generic claims.

Link ESG content to the business model and risks, provide data tables and governance structure, and ensure sustainability materials are consistent with filings and do not create separate narratives that could conflict with financial communications.

The global standard
Include ESG where it impacts risk, resilience, demand, regulation, or cost of capital, using metrics and progress rather than aspiration.

10 What governance and board information do investors expect to find easily?

Investors expect fast access to board composition, committee structures, charters, key policies, executive compensation frameworks, and shareholder rights information.

Confusing governance pages increase skepticism, especially in activism-prone environments. Keep governance content current, ensure policy documents are easy to locate, and present governance in a clear, plain-language summary supported by detailed documents.

The global standard
Transparency that reduces governance uncertainty and supports trust.

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How do we design the site to support activism preparedness?

Activism exploits ambiguity, so the site should reduce ambiguity. Investors are less susceptible to activist narratives when the company's own story is clear and evidence-based.

Ensure the site hosts durable materials that explain portfolio logic, capital returns policy, and accountability milestones so stakeholders can evaluate claims against facts.

The global standard
A clear strategy narrative, capital allocation framework, governance transparency, and performance/KPI history that makes the company's value creation logic defensible.

Retail needs simplification, not different substance. Investors will compare.

Create a retail section that points to the same canonical deck and KPI definitions, avoids hype, and emphasizes long-term milestones and fundamentals, expanding access without increasing Reg FD or narrative divergence risk.

The global standard
Provide a retail-friendly pathway—glossary, "how we make money," and FAQs—while keeping all information consistent with institutional materials.

13 What FAQs should a best-in-class IR website include?

FAQs should address recurring investor misunderstandings and high-impact questions: business model mechanics, KPIs, seasonality, capital allocation, guidance philosophy, and risk factors. Investors value direct answers grounded in public information.

Update FAQs quarterly based on Q&A themes, keep answers consistent with disclosures, and date-stamp updates so investors know the content is current and governed.

The global standard
An FAQ that reduces repetitive inbound and improves market comprehension.

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How do we ensure global usability, accessibility, and compliance?

Global investors need fast load times, mobile usability, clear language, and accessible formats. Poor usability is a credibility tax.

Test globally, provide downloadable content in standard formats, ensure captions or transcripts for webcasts where possible, and maintain a disciplined publishing process that prevents broken links and inconsistent dates.

The global standard
Accessibility compliance, clear typography, and files that work across devices and regions.

15 How do we prevent inadvertent disclosure issues through the website?

The website must not become an uncontrolled disclosure channel. Investors and regulators treat posted information as public statements.

Establish a publishing workflow with legal/IR review, use a single source of truth for KPIs and materials, and audit the site regularly so outdated or inconsistent documents do not remain discoverable.

The global standard
Governance: only approved content, consistent definitions, version control, and rapid removal of incorrect postings.

16 What is best practice for archiving and version control?

Investors need history, but they also need clarity on what is current. Confusing archives create misunderstanding.

Standardize file naming (date + title), keep old versions accessible but clearly marked, and ensure KPI definitions and methodology changes are documented with bridges so historical comparability is preserved.

The global standard
Maintain an archive with clear date labels while highlighting the current canonical documents at the top level.

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How do we use the site to improve targeting and conversion?

Conversion improves when investors can self-serve proof. Targeting fails when investors leave meetings without usable materials.

Build a "materials for committee" section, keep the core deck and KPI pack prominent, and ensure the site's structure aligns with the underwriting arc used in meetings and events.

The global standard
Design the site so investors can quickly find the thesis, drivers, KPIs, and milestones needed to take your story into committee.

18 How should we measure IR website effectiveness?

Measure utility and comprehension, not vanity traffic. Investors use the site when it solves problems.

Track user paths, identify drop-off points, and continuously refine navigation and content clarity so the site becomes a trust-building tool that lowers friction and volatility.

The global standard
Metrics include engagement with key assets (deck, KPI library, transcript), reduction in repetitive inbound questions, time-to-find for core documents, and increases in quality investor interactions.

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How often should the IR website be refreshed and who should own it?

Refresh should match disclosure cadence and governance standards. Ownership should sit with IR, with defined workflows for legal, finance, and communications inputs.

Use a publishing calendar, assign clear content owners, and maintain a single source of truth for metrics so updates are fast, consistent, and defensible.

The global standard
Quarterly refresh of core pages, immediate posting of events/materials, and continuous updates to FAQs and governance changes.

What does a "global standard" IR website look like in practice?

It is a clean, fast, globally accessible platform that makes the business easy to underwrite and the disclosures easy to trust.

The global standard delivers a stable KPI library, clear strategy and capital allocation frameworks, prompt materials posting, and disciplined governance that prevents drift and errors.

Over time, it reduces confusion, improves shareholder conversion, and strengthens valuation resilience by making your public truth easy to find and hard to misinterpret.

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We bring distinctive judgment and deep market insight to the decisions that shape valuation, command investor confidence, and position companies for enduring leadership.

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