



White paper

Harnessing AI in Investor Relations: Trends, Challenges & Use Cases





Table of Contents

Introduction: It’s IR’s Turn to Harness AI	2
The Role of AI in IR	5
Current AI Trends in IR	8
Overcoming Challenges	13
Top Use Cases: Putting the AI in Investor Relations	18
Future Outlook	26
Conclusion: Success in the Age of AI	30

Introduction:

It's IR's Turn to Harness AI

The Nexe logo is displayed in white text on a black rounded rectangular background. The background of the slide features a vibrant green and blue gradient with a diagonal streak of iridescent light on the left side.

Nexe.



AI helps me simplify — and even get rid of — a lot of the administrative tasks in my day. I can better manage my workflow and make my role what I want it to be. I use generative AI to increase my productivity.



Kam Mangat,

VP of Investor Relations and
Corporate Strategy / NEXE Innovations

A breakneck pace of change has swept the financial sector over the last several years — with AI (in particular, generative AI) and automation at the heart of it. As financial markets become ever-more complex, AI can enable businesses to be more agile: rapidly processing vast quantities of information; identifying opportunities, anomalies and trends; and facilitating sounder decision-making based on real-time data; among other benefits.

And whereas a year ago saw a heady rush to embrace generative AI (GenAI) for GenAI's sake, businesses today are increasingly discerning: seeking applications and use cases that aren't just flashy but deliver measurable and sustained value.

To that end, various fintech innovations — AI-driven trading, AI-based fraud and risk detection, customer service chatbots, personalized recommendations, and so on — are already having a pervasive and transformative impact. In the global banking sector alone, generative AI could add between \$200 billion and \$340 billion in value annually, largely through increased productivity, **according to McKinsey**. Buoyed by these successes, leaders are eager to adopt it in the right way: **Gartner reports** nearly 7 in 10 financial services executives say GenAI tools have the potential for benefits — rather than risks — for their organization.



Tapping into AI in IR

Across industries, the area of investor relations (IR), in particular, is ripe for change: standing to be positively impacted by AI. As the scope of IR and the role of investor relations officers (IROs) have greatly expanded — becoming more strategic, proactive and extensive in nature —

AI can automate many time-consuming tasks: summarizing notes and market events, drafting earnings scripts and regulatory disclosures, analyzing investor sentiment, and so on.

Even with these hugely beneficial productivity gains, it's myopic to think of AI as only an efficiency driver: It has the potential to function as a strategic partner and collaborator, too. For example, leading AI-based IR operations (IR Ops) platforms extract actionable insights from structured and unstructured data to finetune investor targeting, enable more personalized and strategic outreach, and aid in decision-making — all servicing the goal of improving market perception and company valuation.

Because every IR team is unique, they can tap AI in different ways and to serve different goals. As change barrels ahead, we'll look at how businesses can apply AI to keep pace with (and ahead of) IR demands, remain competitive, and stay future-ready.



Exploring more

In this whitepaper, we'll explore the role of AI in IR: in particular, trends in usage, AI challenges, security considerations, compelling use cases, and the outlook for AI in IR in the future.

Because every IR team is unique, they can tap AI in different ways and to serve different goals. As change barrels ahead, we'll look at how businesses can apply AI to keep pace with (and ahead of) IR demands, remain competitive, and stay future-ready.

The Role of AI in IR



We've all looked at ChatGPT and been amazed. Now, we're on the cusp of a really exciting and interesting period, where GenAI can bring together IR data, integrate workflows, and surface actionable insights and opportunities that truly underscore IR's strategic value...

Stakeholders expect things to go right: When you deliver an earnings call with no mistakes, there's no ticker-tape parade. But when IROs bring on a new investor or deliver a new insight, the business takes notice. And GenAI is in a great position to help with this.



Darrell Heaps,
Founder and CEO, Q4



Another day, another to-do list! On any given workday, IROs might find themselves with action items such as:

- ✓ **Collaborate on/draft quarterly earnings report**
- ✓ **Draft earnings script & press release**
- ✓ **Conduct investor meeting prep**
- ✓ **Prepare execs for likely analyst questions**
- ✓ **Target/identify new investors**
- ✓ **Summarize recent market and competitor news for exec team**
- ✓ **Internal reporting: Analyze analyst and shareholder sentiment**
- ✓ **Respond to new investor queries**
- ✓ **Monitor stock performance**
- ✓ **Track shareholder information (new investors? changes in ownership?)**
- ✓ **Flag activist investor activity (create mitigation plan)**
- ✓ **Prepare & submit regulatory filings**
- ✓ **And so on...**

IROs and their agencies no longer have to tackle these varied types of activities manually and solo. These are all areas where AI can be — and already is — augmenting human efforts, streamlining and expediting processes, and making a notable dent in IR to-do lists.

This willingness in IR to experiment with AI, and integrate it more deeply into workflows, hasn't been widespread until relatively recently, though. This is despite the financial sector, as a whole, being more of an early adopter (as mentioned, think: AI-driven trading, chatbots/AI assistants such as Bank of America's Erica, AI-powered fraud detection, etc.).



A number of factors contributed to IR being somewhat “late to the AI party”: including complex IR workflows and regulatory requirements, security concerns around sensitive financial data, the conservative nature of IR’s role, and the fact that core IR tasks (such as personalized outreach to investors, strategic planning, compliance responsibilities, etc.) are often considered nuanced and more in humans’ domain. In fact, prior to 2020, AI’s usage in IR was largely limited to data analytics and reporting automation, with more qualitative analysis and strategic planning left to humans.

However, the rise of generative AI, large language models (LLMs), and natural language processing (NLP) tools (that can process and respond to queries in longform, natural language) have changed the game. As we’ll explore later on, AI can now assist with a host of important IR tasks — simplifying and/or knocking off many of the to-do items above. Perhaps most notably, it’s being used to **drive efficiency gains** (taking a first crack at earnings scripts, summarizing market events, prepping for meetings, targeting, etc.), **improve communication strategies** (identifying topics of interest to investors, and drafting or refining outreach), **enhance and expedite decision-making** (based on actionable insights), and more.

As enterprise workers show a **40% performance boost** from GenAI, IR now stands poised to realize those benefits too. Market and role-specific complexities no longer serve as AI deterrents; in fact, AI is helping IROs better navigate those areas.

A recent **Q4 survey** highlights the transformative impact IROs believe AI will have:



Nearly three-quarters of **IROs (73%)** believe AI will save them time on administrative tasks and increase their effectiveness



6 in 10 IROs (60%) think AI will allow them more time for strategic initiatives

Current AI Trends in IR



We sit on top of a universe of data. Every earnings call transcript, analyst question, investor engagement — we can process it all and use secure AI to ask questions like: ‘What are the top 10 questions analysts are likely to ask during our earnings Q&A?’ ‘What themes will they focus on?’ That’s where the power of a single, AI-driven platform is incredibly beneficial to us.



Felix Veksler,
Head of Investor Relations, Monro



There's a vast amount of data available to investor relations teams and companies at large today. We're in the Age of AI — which means it's increasingly easy to process and analyze that information, report on it, and use it to refine strategies and decision-making. As AI becomes a more standard component within IR workflows, it's already being used in a number of ways to drive efficiencies and foster better IR outcomes.

With the caveat that innovation moves quickly — **and today's more progressive and cutting-edge use cases may be table stakes in the future** — let's explore four current AI trends in investor relations:

1. Automated data analysis and reporting

Data analysis, when done manually and by humans, can be both time-consuming and error prone. Today, IR teams are able to do more, in less time and with far greater accuracy: applying AI to analyze and report on large quantities of financial information. The use cases are near-endless and can be mapped to IR's specific needs: whether that's analyzing data and investor engagement, preparing for earnings, identifying and targeting potential investors, creating board reports to proactively inform executives, and so on.

AI's capabilities go beyond summarization. Thanks to natural language processing technologies, IR teams can access actionable takeaways, insights and next steps.

In addition, AI is able to bring patterns to the fore, and flag signals and discrepancies that may merit action. In today's fast-paced landscape, having up-to-the-minute information and analysis to guide decision-making is critical. AI puts all this info at IR pros' fingertips in a rapid, digestible and usable way.

2. Predictive analytics for investor behavior

“Which investors are most likely to increase (or decrease) their holdings?”

“Are there signs of activist investor behavior?”

“How will market trends impact our stock performance over the next quarter?”

Beyond simply summarizing past information and analyzing completed events, AI and machine learning models can also predict what’ll happen in the future — addressing the areas above and also predicting the questions analysts are likely to ask during earnings calls. By digesting data, identifying patterns and applying predictive analysis, these models help IROs anticipate the topics and concerns that may arise. This capability is invaluable in investor relations, enabling IROs to proactively shape communication strategies, address potential investor concerns and align messaging to market sentiment.

So, when applying predictive analytics to IR, areas such as current and historical investor engagement data, trading behaviors, market events and more get fed into the crystal ball — often with the goal of determining likely investor behavior.



In the future, businesses preparing to announce quarterly earnings could leverage AI-based predictive analytics tools to forecast reactions across various investor segments, such as retail, institutional and activist investors. By anticipating how these groups might respond, IROs could proactively tailor their messaging and strategies to manage and address investor concerns — ultimately enhancing the impact and effectiveness of their communication during earnings announcements. With advanced insights such as these, IR teams can also move from reactive to proactive communication strategies.

3. AI-driven decision making

As discussed, thanks to AI, IR teams can instantly access important summaries and analyses. Next up is putting those insights to good use — using AI to support strategic and data-driven decision-making. Here, IR teams lean on AI to reduce business risks and determine actions that will increase their company's valuation.

AI-driven decision-making can transform investor engagement by enabling IROs to prioritize time and resources strategically. Leveraging engagement data, peer analysis and market trends, AI can identify which investors are most relevant to the business, guiding IROs to focus on those with the highest potential impact.

For example, AI tools can analyze which investors actively engage with industry peers but haven't yet engaged with the business, providing targeted recommendations to pursue these connections. AI can also help tailor communication strategies, offering insights on how to approach different investor segments — whether growth-oriented or value-focused — with messaging that resonates specifically with each group's priorities. Additionally, AI can detect broader trends, such as potential early warning signs of activist behavior, equipping IROs to make proactive, informed decisions that mitigate risks and enhance investor relations.

4. Consolidated, AI-powered platforms



The fragmented IR technology landscape — with “point solutions” for investor relations websites, virtual events, IR CRMs, shareholder identification, engagement analytics and so on — often results in an overly complicated IR tech stack. To that end, IR teams have grappled with reconciling disparate tools that don't play nicely with each other or exchange data in real time — and with the time, administrative and security challenges that come with this.

The recent advent of holistic **IR Ops Platforms** addresses these issues: consolidating tools and vendor relationships; eliminating data silos and improving data management; enhancing security postures; and yielding more powerful, cross-platform analytics and insights.

AI is a core part of such platforms — layered securely across components to: quickly extract insights from platform and user data; improve reporting accuracy and consistency; support rapid, data-driven decisions; and ensure IR teams aren't mired in menial tasks. With AI drawing insights and improving efficiencies across a wide range of IR tasks and functions, IR teams have the data, workflows and information they need to improve stakeholder communications and their company's market value.



I consolidated a lot of our tech stack behind Q4 because I know them as a trusted partner in the space. Right away, by consolidating, I was able to create efficiencies. With their AI and automation, we can spend more time on messaging and preparing executives for earnings Q&A. Q4's AI also helps us answer questions like: 'Looking across our relevant analysts, what are the top 10 questions they're likely to ask on our earnings call?'



Felix Veksler,
Head of Investor Relations, Monro

Overcoming Challenges



Nexe.

“

I have a suggestion for IR pros: Even if your company doesn't allow AI — whether it's Claude or Perplexity or ChatGPT — get a personal account, and start using it. I've found that once you start prompting, you become better at it, and it sparks other ideas. Now, in my day-to-day job, when I'm doing something administrative, I step back and say, 'Why don't I use AI for this?'



Kam Mangat,

VP of Investor Relations and
Corporate Strategy / NEXE Innovations

Even with high interest in deploying AI and GenAI, companies can run into roadblocks — related to security, existing infrastructure, costs and so on. This is part of the process with any new technology. Let's look at some common challenges IR teams and their organizations may experience, and ways to both counter and mitigate them:



Challenge #1

Data security and privacy

Does introducing AI mean introducing a security nightmare?

In their day-to-day roles, IR pros handle sensitive information — including confidential earnings, financial, and shareholder data. Ensuring the security and privacy of that information is non-negotiable. Breaches erode investor and market trust, and can result in significant reputational and operational damage, as well as financial penalties. So, it's incredibly important for IR teams and their organizations to ensure their **AI is secure**, and that any confidential information relayed to it will remain as such and not be used as training data.

From a security perspective, as AI tools and automation get introduced into IR and other corporate environments, the attack surface also increases — necessitating a **strong cybersecurity posture** that includes role-based

access, comprehensive user training, multi-factor authentication, and a phased approach to AI implementations. With such an approach, rather than introduce AI all at once, IR teams can try it out first with their least sensitive systems and data (e.g., publicly available market news, already-published earnings reports, etc.); see how it behaves; and gradually roll out AI to more sensitive data and functions.

AI-driven, all-in-one IR Ops Platforms have **also been shown** to strengthen security postures by consolidating vendor relationships — with data shared with one trusted partner, rather than floating out to myriad “point products” that have different cybersecurity approaches/policies and create gaps.



Challenge #2

Regulatory requirements



The data privacy compliance landscape is complex! How does AI fit in?

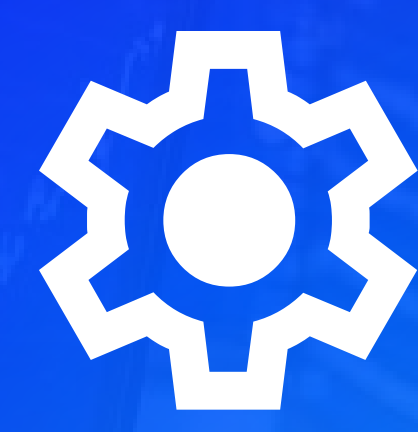
In their daily activities and outreach, IR teams face the need to comply with a range of data security and privacy regulations — which increases when their business operates on a global scale. For example: the California Consumer Privacy Act (**CCPA**) and General Data Protection Regulation (**GDPR**) in Europe (which deal with how to collect, store and process personal data); U.S. **SEC guidelines and rules**, including **Regulation FD** (ensuring fair disclosure to investors); and proposed data privacy laws in Canada — including the **Digital Charter Implementation Act, 2022** and **Artificial Intelligence Data Act** (AIDA), among others.

So, what does this all mean for AI implementations? It's important to:

Select tools with compliance and security features baked in — **strong encryption, data anonymization, consent and opt-out functionality, GDPR compliant, etc.**

Work with vendors who've earned key information security certifications, such as **SOC 2 Type 2**.

In addition, as regulations such as GDPR specify that personal data be collected only for specific purposes, IR teams will find that AI tools purpose-built for IR (rather than general/multipurpose platforms) avoid collecting unnecessary information and can help drive compliance.



Challenge #3

Integration with existing systems

Will legacy tech 'play nicely' with AI?

Strategically introducing AI into IR environments often means it's time to evaluate existing IR tech stacks. How well are they supporting current and future needs?

As IR teams seek to realize the benefits of AI, they can find that, unfortunately, many of their legacy systems weren't designed with AI capabilities in mind — lacking the data sharing protocols and flexibility to effectively support them. What's more, bolting on AI after-the-fact can be time-consuming, expensive and disruptive to workflows... and sometimes, the end result can still yield data silos and a disjointed user experience.

To ease these pain points, consider:

✓ **Taking a phased approach to AI deployment** - starting with using AI in one area of IR (e.g., summarizing market news) and expanding from there, to gain experience and minimize disruption.

- ✓ **Ensuring utilization of secure AI** - implementing secure AI from the start. This is crucial to maintain control and ownership of your data, including using a closed infrastructure and avoiding interactions with third-party services.
- ✓ **Providing training and change management** to employees, so they can optimize workflows with AI tools and see the best time-to-value.
- ✓ **Adopting a consolidated IR Ops Platform**, if wrangling multiple point solutions proves too unwieldy. With built-in AI for core IR activities, these platforms scale with the business; unify workflows; deliver real-time, cross-platform insights; and support data-driven decision-making to improve IR outcomes. Training is simplified, too, as employees only need to learn one platform.



Challenge #4

Cost and Resource Allocation



So, let's talk about costs: Is implementing AI worth it?

At a time when budgets may be strapped, and with IR teams often small, it's important to gauge whether new investments are worth the time and effort to implement. Is it better to stay with the status quo?

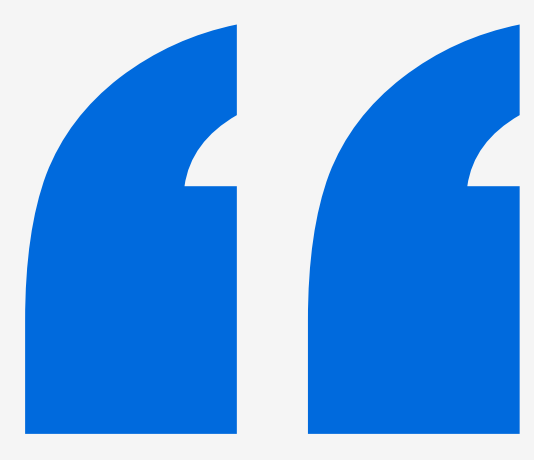
A well-executed AI strategy can bring numerous benefits to IR. It's important, though, for IR teams to think through why they're applying AI in the first place and what they want to achieve — Save time on earnings scripts? Get a better understanding of their investor base? Improve the speed and accuracy of decision-making? And so on. Think about activities where it makes sense for AI to step in, and put a plan in place to measure and evaluate metrics at regular intervals.

When IR teams weigh long-term benefits (and even expected “quick wins”) against their upfront investments, there's often a compelling case for AI implementations.

Some of these initial investments include the software and tools, themselves — as well as infrastructure upgrades, data preparation and cleansing, and training/change management... and the manpower associated with all that. To drive success, and avoid surprises and delays, companies benefit from having a transition plan — and dedicated transition team — when implementing major new technologies.

Top Use Cases

Putting the AI in Investor Relations

 IR magazine

It's not news that IROs face a growing host of challenges in their current roles, and most of those are centered on a significant number of repetitive tasks: scripting earnings Q&As, putting together board meeting notes, and so on. The old school method of collecting data analysis is fraught with inefficiencies too, which often makes it difficult for IROs to maintain accurate and up-to-date information. AI-driven workflows can free them up, and allow them to spend more time on strategic activities.



Laurie Havelock,
Editor, IR Magazine

As IROs and IR agencies look to tap into — and/or expand their use of — AI, they’ll find the time is ripe. With a near limitless range of AI applications, IR teams can map their usage to their challenges, goals, AI and technology maturity, and appetite to “push the envelope” with innovation. Let’s look at some common IR problems and challenges that AI can address, and specific ways to tackle them with AI.

Problem #1: Too many “timesucks”!

It’s common to hear: *“Our team spends too much time on manual, repetitive tasks!”* and/or *“Earnings prep is all-consuming!”* In fact, **data from Q4** shows 42% of IR pros spend 60 or more hours (each!) on earnings prep each quarter.

Goal

Use AI to drive efficiencies and time savings — freeing up hours for other strategic priorities.

Ways to apply AI

Consider using AI and GenAI to streamline, automate and take first crack at a number of **time-consuming IR tasks including:**

- ✓ Performing data entry (e.g., investor profiles, shareholder data, regulatory filings, etc.)
- ✓ Summarizing market news
- ✓ Scheduling meetings
- ✓ Generating “briefing books” to prepare for analyst or investor meetings
- ✓ Identifying what an analyst has been focused on lately
- ✓ Summarizing meetings (e.g., with investors, analysts, etc.)
- ✓ Drafting earnings scripts and announcements
- ✓ Drafting other content (e.g., event invitations)
- ✓ Tracking stock changes over the last 30 days
- ✓ Tracking top institutional holders and quarterly changes
- ✓ Pulling information about peer companies (financial performance, valuation, investor base, etc.)
- ✓ Outlining reports and investor presentations



Sample use case



Ash Aulds, Director of IR and FP&A, Murphy USA

We currently use GenAI to summarize research reports. What are the key points we need to pay attention to in each one? I also use it in my role when I want to change the tone of my writing. I throw what I was intending to say into Copilot and have it polish it up.

I also think GenAI can be a great help in meeting preparation. Before we meet with anyone, it's good to know: What were the last four or five interactions we had with them? Can I get a summary of those conversations? What topics were they interested in? That's where I start looking at saving a ton of time.

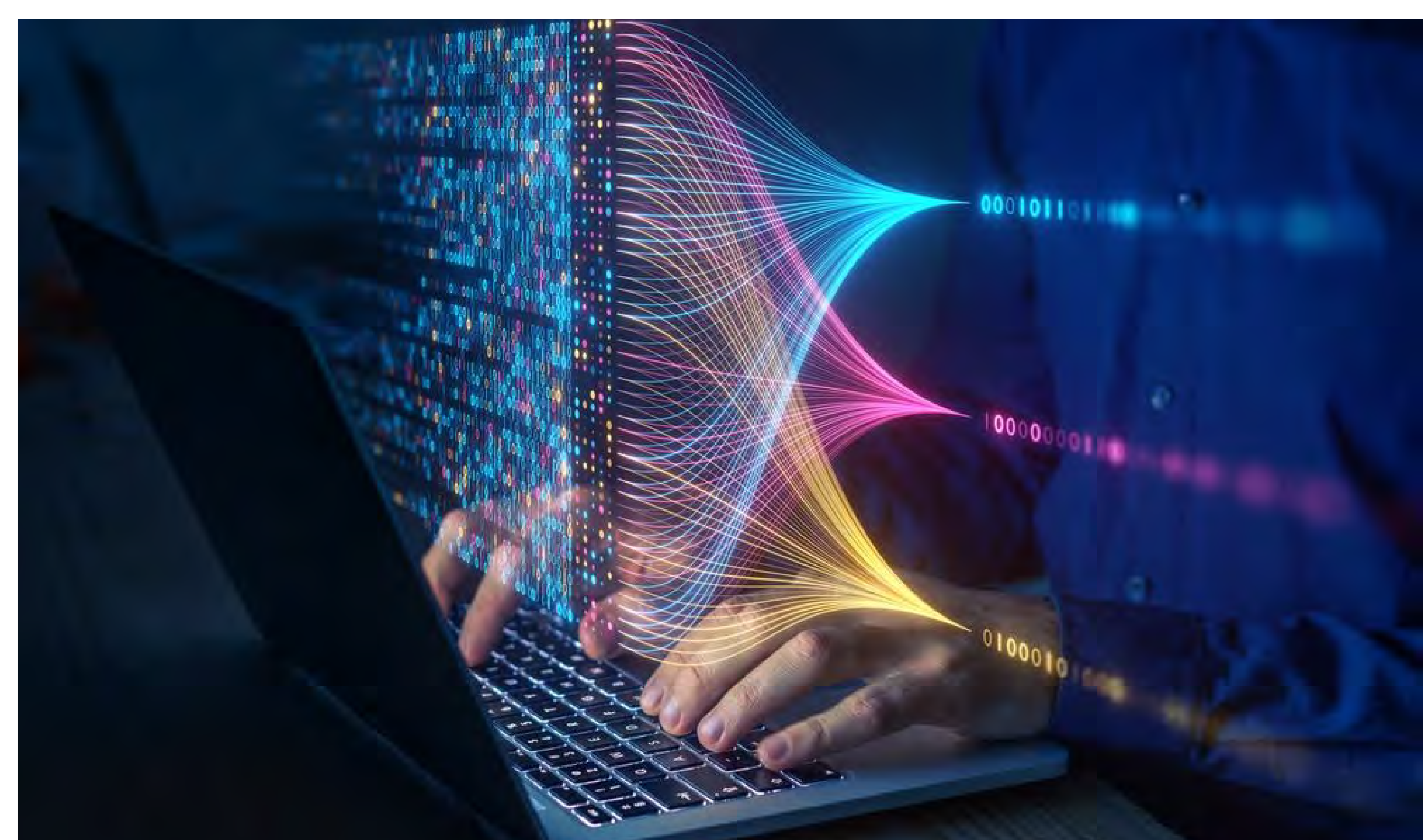


Problem #2: We're drowning in data!

Data — about investor engagement, market trends, financial performance, etc. — can be the lifeblood of strategic IR decision-making. However, with vast amounts of data available, sifting through it can be overwhelming. Plus, human analysis can take too long and be error-prone.

Goal

Harness those insights! Use AI to improve the accuracy of data analysis — highlighting trends, anomalies and high-impact information.



Ways to apply AI

Let AI crunch the numbers and chew on the implications. **Real-time data processing and analytics can provide up-to-the-minute insights into:**

- ✓ Investor sentiment analysis — based on earnings calls, media articles, social media channels (etc.), so IR pros can gauge market perception and identify shifts that may impact stock performance
- ✓ Analyst sentiment analysis
- ✓ Top 10 questions expected from analysts during earnings calls
- ✓ Highly engaged investors
- ✓ Activist investors & campaigns (based on changes in trading patterns, social media activity, web analytics, etc.)
- ✓ Future market trends
- ✓ Likely investor behavior/reactions to upcoming news
- ✓ Stock drivers: Why is stock up (or down)?
- ✓ Real-time risk assessments

Sample use case



Scott McLaughlin, SVP, Invitation Homes, Inc.

If I could use AI to automate one part of my job, it would be monitoring investor sentiment. It's necessary to understand how investors perceive your company on a day-to-day basis, but it's time-consuming to gauge this accurately. It involves a lot of communication, dialogue and outreach. Automating sentiment-tracking would be beneficial, in a way that balances applying technology with also maintaining human relationships.





Belinda Overdeput, Senior Director of Investor Relations, PROS Holdings, Inc.

Q&A prep is a huge part of the job. A lot of time goes into anticipating the questions investors might ask based on where the business stands and the information we're sharing. Ensuring the management team is set up for success when marketing to investors is critical. While this involves a lot of human insight — understanding how people think, their emotions and personalities — there are definitely opportunities to automate certain aspects of the process.

For example, if we could automate more of the analysis on how information drives specific questions, it would be a massive value-add. This would allow us to better prepare our materials, build our story more strategically, and create more tailored engagement opportunities with our current and prospective investors.



Problem #3: One size doesn't fit all when it comes to investor engagement!

IR pros need to conduct outreach out, and keep track of, a wide range of investors — all with different goals, behaviors, and expectations. These include retail investors, institutional investors, activist investors, Environmental, Social and Governance (ESG) investors, and growth investors — to name a few. And even within each segment, investor priorities vary.

While it can be tempting to save time and send uniform communications, IR pros and their companies are better served by personalizing engagement, and conducting proactive and reactive outreach in a timely manner.

Goal

Use AI to identify investor priorities and concerns, and personalize outreach immediately and accordingly.

Ways to apply AI

AI can tap into relevant data to help with investor targeting and communications, by:

- ☑ Accessing institutional ownership and engagement data
- ☑ Identifying investor concerns by investor type
- ☑ Predicting investor reactions to upcoming news
- ☑ Providing/drafting an email outreach template, tailored to investor segments/concerns
- ☑ Flagging engaged activists and suggesting next steps
- ☑ Customizing content delivery, with specialized reports or dashboards available to each investor that highlights the metrics they care most about
- ☑ Identifying key institutional investors and assembling background/prep information to better tailor discussions with them
- ☑ Helping target new investors — e.g., identifying those with strong engagement and similar investment profiles, pulling contact information, and drafting outreach materials
- ☑ Using chatbots and AI/NLP-driven communication tools to provide immediate responses to investor queries online



Sample use case



Belinda Overdeput, Senior Director of Investor Relations, PROS Holdings, Inc.

At PROS, we view AI not as a job replacer, but as a tool that frees up time to focus on strategic work and makes people more strategic in their roles. Understanding how AI impacts our interactions with both the buy side and sell side — and acting on this — will remain critical moving forward.



Problem #4: We need to move faster to create strategic advantage!

Dynamic business conditions, changing investor priorities, and market shifts often dictate that IR pros act decisively and act now — whether they're managing earnings surprises, responding to stock price volatility, addressing ESG concerns, reacting to regulatory changes, mitigating activist investor activity, and so on. Acting quickly — and correctly — can be a challenge.

Goal

Use AI as more than just a time-saver: helping support strategic planning and enabling better decision-making.

Ways to apply AI

IR pros and their companies can feed AI information, explain their business use case, and ask AI to help with key decisions. When AI models have access to larger and larger data sets (combining public, proprietary, personal and company data), the AI becomes even more powerful and useful.

Consider using AI to analyze information and answer questions such as:

- ☑ Across our last 10 interactions, which investors should I focus on to increase their position?
- ☑ What are the top tasks we should focus on to improve our valuation?
- ☑ What are some ways to improve shareholder returns?



Sample use case



Darrell Heaps, Founder and CEO, Q4, in Forbes

We're entering the Age of GenAI Enlightenment — which means looking at GenAI not just in terms of how it can make us faster — but also how it can make us stronger, smarter, more creative people. To that end, the real power is when you use it consultatively: letting GenAI use all the data it has access to, along with information about your business, to help you make better decisions. When you reset your mentality — recognizing you have free, anytime access to the world's foremost consultant and expert, and exploiting that — the results can be mind-blowing.



Future Outlook



AI is moving from being something you simply ask a question of, to a true thought-partner — much like a consultant.



Darrell Heaps,
Founder and CEO, Q4

As IR teams continue to identify compelling use cases and reap the benefits of AI, the future is bright for greater technology innovation. IR pros should anticipate continuous learning around AI, investigate and evaluate new use cases, and be open and adaptable to methods that may improve both their workflows and decision-making.

At the same time, it behooves IR pros and their companies to keep in mind AI is a tool — and as they tackle various challenges, they should keep their end goals in mind: Will AI best achieve them? Or are they better served by a different technology or even a human-led process? Again, focusing on what they want to achieve will help IR teams gauge when and how to best apply AI.

With further AI advances and experimentation, expect the following in the future:



AI as a strategic collaborator

As mentioned in the previous chapter, AI can be so much more than an IR timesaver. Today, it's often used to answer one-off questions:

Which investors have recently increased or decreased their holdings?

What has been the performance of our stock over the last month?

enabling IR pros to get what they need and move on with their days. While these are valid and valuable use cases, **the future involves AI taking on a more strategic role:** functioning as a strategic collaborator, and able to aid in task prioritization and decision-making.

Assuming the AI is set up in a secure way — with data not being used to train the models, and sensitive information not available to public audiences — AI becomes exponentially more valuable when it pulls from many sources of information. As **Q4 CEO Darrell Heaps** explains in a [Forbes article](#):



When you give GenAI access to larger and larger data sets — combining public data, material non-public information that GenAI accesses from your company and/or personal data (e.g., internal reports, calendar details, meeting notes, etc.), and proprietary vendor data (e.g., engagement analytics) — the AI becomes more powerful and useful. All of this information creates a highly actionable data lake from which GenAI can extract strategic information.



Darrell Heaps,
Founder and CEO, Q4, in Forbes

So, when answering more complicated and multifaceted questions — like:

What are the top 3 ways to increase our company's valuation?

How can we thwart this activist investor campaign?

How are we addressing key ESG risks and opportunities in our industry?

expect AI to have a seat at the table.

More useful AI outputs and interfaces

Applying AI to address the questions above is forward-looking, useful and strategic. Today, though, for the most part, IR teams and other business functions that leverage GenAI in this way have actionable information only within the confines of chat. Accessing the details after a period of time requires scrolling. And information won't update itself based on new data unless IR pros explicitly ask it to.

In the future, expect more leading-edge companies to move toward pulling insights into interactive, user-centric interfaces — functioning as a to-do list of sorts. IR teams could pin lists like: **“Tasks for the Week,” “Top 5 Ways to Increase Our Company’s Valuation,” “Analysis of Our Stock Price Drivers”** and so on — keeping what they need front-and-center and constantly updated, as data changes.

This moves into the realm of what some are terming “generative business intelligence” (GenBI): applying GenAI to generate reports and insights from business data to drive decision-making.

Consolidated, AI-driven platforms

As AI becomes more widely integrated into multiple aspects of investor relations, IR teams will likely also move away from point solutions that currently address their responsibilities in a piecemeal, disjointed way — and instead, seek to tackle the broader field of IR Ops with a more holistic, coordinated approach.

To that end, consolidated platforms with AI at their core have proven themselves as a way to drive time savings, surface deeper insights, and better support business strategy. These platforms span and unify the various functions of IR, share data in real time, and use AI effectively to drive differentiated value across all activities.



Conclusion:

Success in the Age of AI

As change sweeps the business and IR landscapes, an inevitable separation is coming between organizations that don't capitalize on AI and those that do. What's more, organizations that do use AI cannot just use it for AI's sake. Competitive, future-ready IR teams will apply AI to reduce busywork, supercharge productivity, and support strategic, creative and outside-the-box thinking. This puts them in the best position to focus on what counts: fortifying investor relationships and business strategy, and improving company valuation.

In its predictions for the year ahead, Gartner **states** that

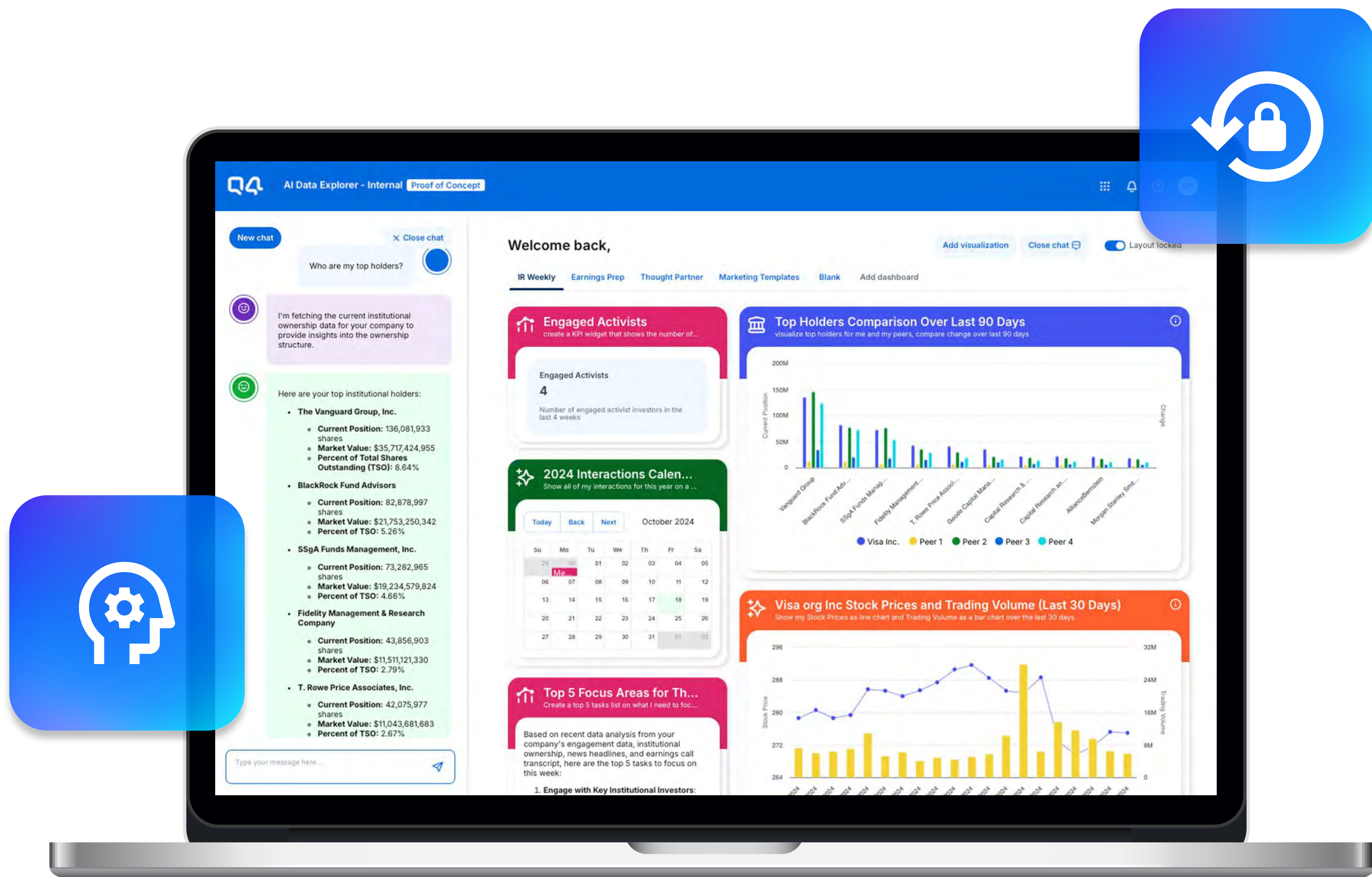


*Every strategic conversation needs to include **GenAI**.*



IR teams who use this as a North Star — with the mentality that AI is more than a productivity-booster — will reap the rewards.

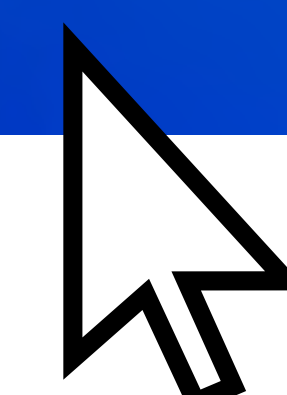
Q4 can help.

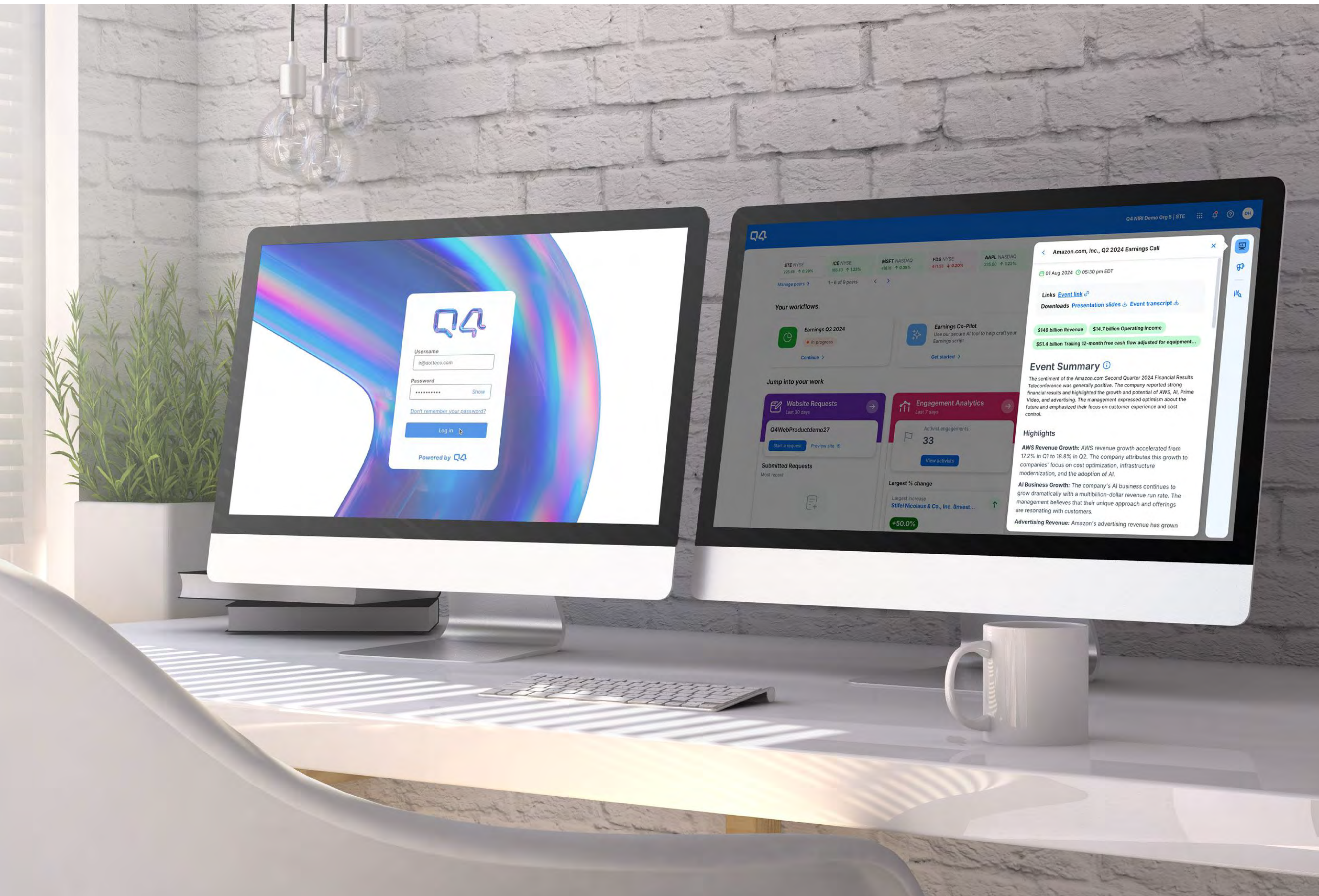


With the consolidated **Q4 Platform**, built on a foundation of secure AI, IR pros can: reduce earnings complexity; accelerate website updates; and surface new, strategic investor opportunities through AI and connected data. Q4 provides AI-driven IR Ops software to empower modern IR teams to measure impact better, focus on strategy, build investor relationships, and make smarter business decisions.



Learn more and request a demo at www.q4inc.com









About Q4 Inc.

Q4 Inc. is the leading provider of IR Ops software with the world's largest set of proprietary investor data, purpose-built to remove obstacles between public companies and their investors. Q4 gives investor relations leaders, C-Suite Executives and their teams the tools to attract, manage, and understand investors — all in one place. The AI-enabled Q4 Platform boasts applications for website and event management, engagement analytics, and overall lifecycle management, including AI Earnings Co-Pilot to generate draft scripts based on historical data, and AI earnings call summaries to understand peer sentiment. The Q4 Platform also includes a streamlined investor CRM and shareholder intelligence with enhanced metrics to elevate investor targeting strategies within the platform. Q4 delivers the data, insights, and workflows that give IR teams the power to focus on what really matters: strategy, relationships, and driving premium valuations for their companies.

The company is a trusted partner to more than 2,600 public companies globally, including many of the most respected brands in the world, and maintains an award winning culture where team members grow and thrive.

Q4 is headquartered in Toronto, with an office located in London. Learn more at www.q4inc.com.

-  q4inc.com
-  (877) 426-7829
-  sales@q4inc.com
-  [/q4tweets](https://twitter.com/q4tweets)