



Leveraging Behavioral and Engagement Analytics to Increase Valuation and Mitigate Risk



Table of Contents

Introduction	3
Chapter 1: The Power of Knowing Your Audience: Lessons from Google	5
• Engagement Analytics: A Key to Google's Success	5
• Lessons for IROs: Applying Google's Data-Driven Approach	6
Chapter 2: Decoding Investor Behavior with Analytics	7
• Behavioral Analytics: Understanding Investor Actions	7
• Engagement Analytics: Measuring Investor Interactions	8
• Examples of Engagement Metrics	10
Chapter 3: Reaping the Rewards: Benefits of Behavioral and Engagement Analytics	10
• Connecting with the Right Investors Faster	10
• Efficiency Gains and Personalized Communication	11
• Measuring Awareness of Your Investor Story	12
• Key Metrics for Measuring Awareness	12
• Uncovering What Investors Care About	12



Chapter 4: Expanding Your Reach and Safeguarding Your Company:
Proactive IR with Engagement Analytics

- The Value of Wider Coverage
- Leveraging Analytics to Expand Coverage
- Proactive Outreach to Analysts and Media
- The Power of Third-Party Validation
- Preparing for Activists: Early Detection and Proactive Engagement
- Benchmarking Your IR Program Performance

Chapter 5: AMD Case Study: Leveraging Intelligent Insights to Deliver Strategic Value

- Gaining Visibility in a Complex Market
- Actionable Insights and Strategic Value
- The Value of Partnership
- Key Takeaways from the AMD Case Study

Chapter 6: Implementing Behavioral and Engagement Analytics in Your IR Strategy

- Getting Started: Laying the Foundation for Success
- Data Collection and Analysis: Building Your Knowledge Base
- Actionable Insights: Turning Data into Results
- Examples of Actionable Insights:
- Continuous Improvement: Staying Ahead of the Curve
- Key Steps for Continuous Improvement

Conclusion

- The Q4 Advantage

13

14

14

15

16

16

17

18

18

18

19

19

20

20

21

22

22

23

23

24

25

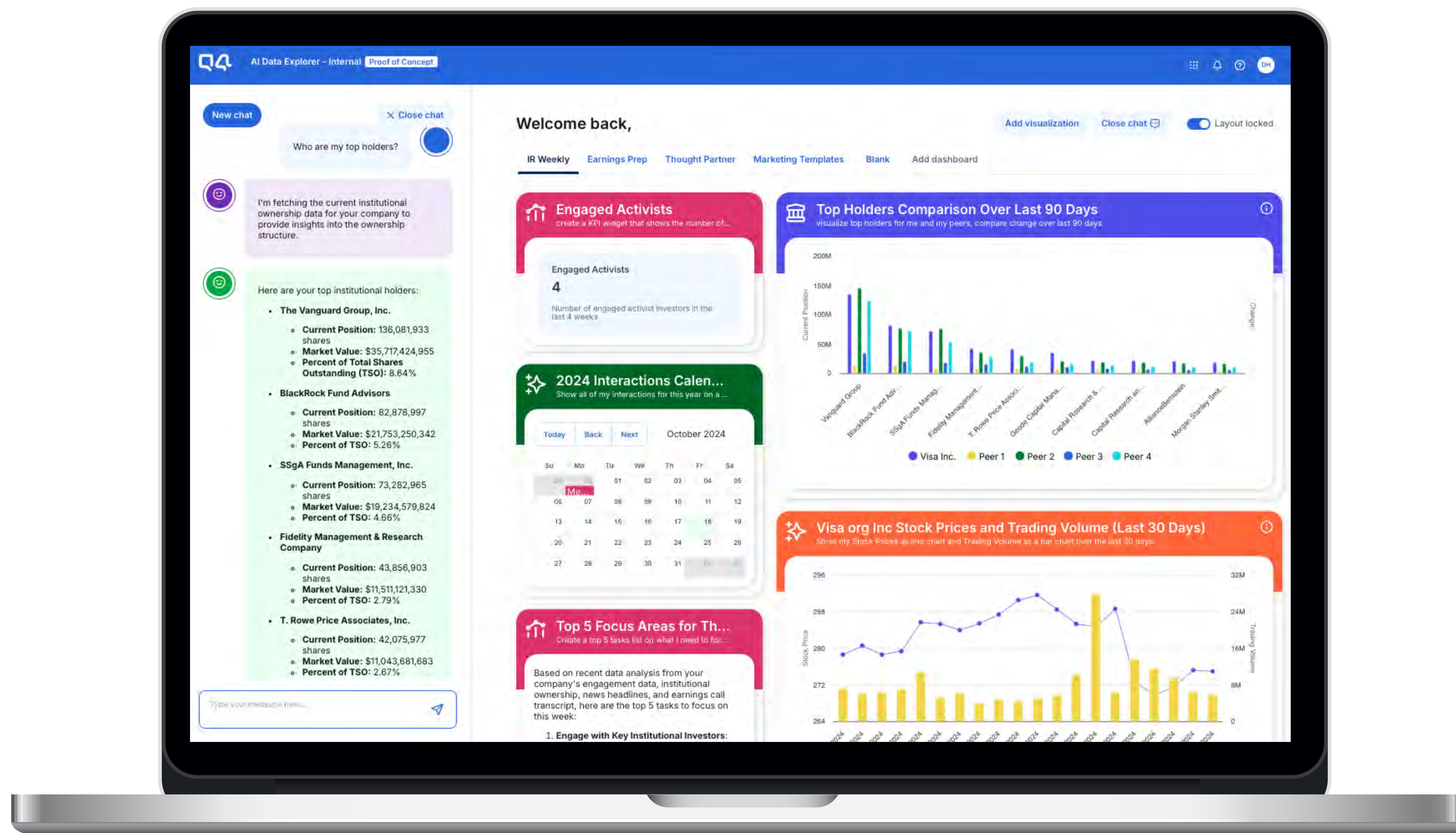


Introduction

Imagine having the power to see into the minds of your investors. To know what truly captures their interest, what concerns them, and what drives their investment decisions. **What if you could anticipate their needs, tailor your communication to resonate with their individual preferences, and build stronger, more meaningful relationships?**

This is the promise of engagement analytics, an approach to investor relations that empowers you to connect with the right investors at the right time with the right message.

Investor Relations Officers (IROs) are strategic advisors, storytellers, and relationship builders who play a crucial role in shaping their company's narrative and driving value. However, with limited resources and a constant influx of information, it can be challenging to cut through the noise and make a real impact.



Engagement analytics provides the solution. This eBook will equip you with the knowledge and tools to revamp your IR strategy, build stronger investor relationships, and drive greater value for your company.

This translates to:



More meaningful investor relationships:

Build stronger relationships by tailoring your communication to align with each investor's interests.



Increased efficiency and ROI:

Streamline targeting efforts by prioritizing investors who are most likely to engage and invest.



Proactive issue management:

Stay ahead of activism threats by identifying early signs of interest.



Data-driven decision-making:

Measure the impact of your IR activities and make informed decisions based on concrete evidence.

Chapter 1: The Power of Knowing Your Audience: Lessons from Google

How does a company like Google, with millions of users and a constantly evolving product landscape, stay ahead of the curve and maintain its position as a global leader?

The answer lies in their deep understanding of their audience – their users, customers, and yes, their investors. Google has mastered its ability to leverage data and analytics to gain insights into stakeholder needs, enabling the customization of its products, services, and communications for maximum impact.



Engagement Analytics: A Key to Google's Success

Google's success is built on a foundation of data-driven decision-making. They track and analyze vast amounts of data to understand user behavior, preferences, and trends. This allows them to:

- ➔ **Develop products and services that meet user's needs:** By understanding how users interact with their products, Google can identify areas for improvement and develop new features that enhance the user experience. Think about how Google Maps uses location data and search history to provide personalized recommendations for restaurants or how YouTube suggests videos based on your viewing history.
- ➔ **Target advertising effectively:** Google's advertising platform relies heavily on data and analytics to target ads to the right audience, maximizing their effectiveness and return on investment. This is why you might see ads for running shoes after searching for marathon training plans.
- ➔ **Communicate effectively:** Google leverages engagement data collected across multiple channels to understand and segment its audience according to their demographics, interests, and online behaviors. This enables them to deliver tailored experiences that connect with users.

Lessons for IROs: Applying Google's Data-Driven Approach

While Google's use of engagement data spans various areas, the underlying principles are highly relevant to investor relations. By adopting a similar data-driven approach, IROs can:

- **Uncover early interest:** Just as Google analyzes search trends to understand user intent, IROs can track activity across their websites, emails and events to identify potential investors who are showing early signs of interest in their company.
- **Keep existing shareholders engaged:** Similar to how YouTube recommends videos based on viewing history, IROs can tailor their communication with investors based on their past interactions and engagement patterns.
- **Understand the market as a whole:** Just as Google analyzes data to understand market trends, IROs can leverage engagement analytics to identify trends in investor behavior, such as topics of interest or preferred communication channels.
- **Understand investor sentiment:** By analyzing the content investors are engaging with, IROs can gain a deeper understanding of their concerns and priorities, similar to how Google analyzes user feedback to improve its products.
- **Detect early interest from activists:** Just as Google monitors online activity to identify potential threats, IROs can use analytics to detect early signs of activist interest and proactively manage potential risks.



Chapter 2: Decoding Investor Behavior with Analytics

To effectively leverage behavioral analytics, it's essential to understand the core concepts and how they apply to investor relations.

Behavioral Analytics: Understanding Investor Actions



Behavioral analytics focuses on understanding what investors do. It involves tracking and analyzing their actions and interactions with your company's online presence, communications, and materials. This data reveals valuable insights into investor preferences, interests, and concerns.

Why is understanding investor actions important?

1

Identify High-Potential Investors: By understanding which investors are most engaged with your company – who is visiting your website, opening emails, downloading reports, and attending events – you can prioritize your outreach and focus your efforts on those most likely to invest.

2

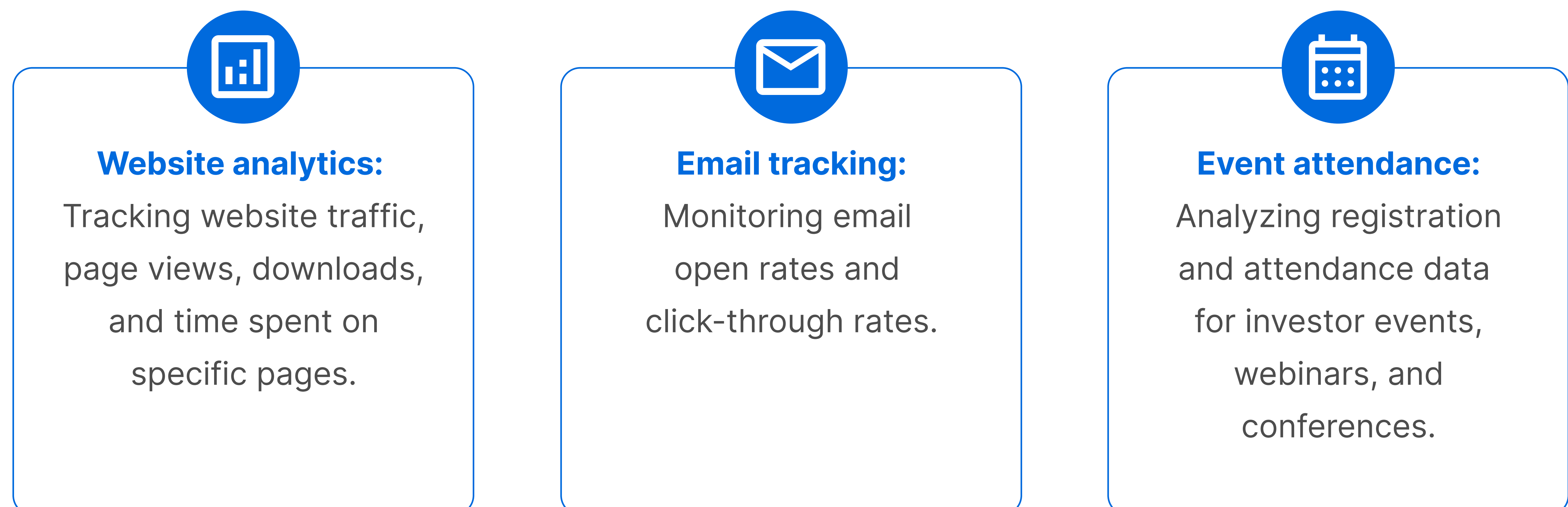
Tailor Your Communication: Knowing what content resonates with different investor segments allows you to personalize your messaging and deliver relevant information that meets their specific needs. For example, if you see an investor frequently downloading your ESG reports, you can personalize your messaging to focus on your company's sustainability initiatives.

3

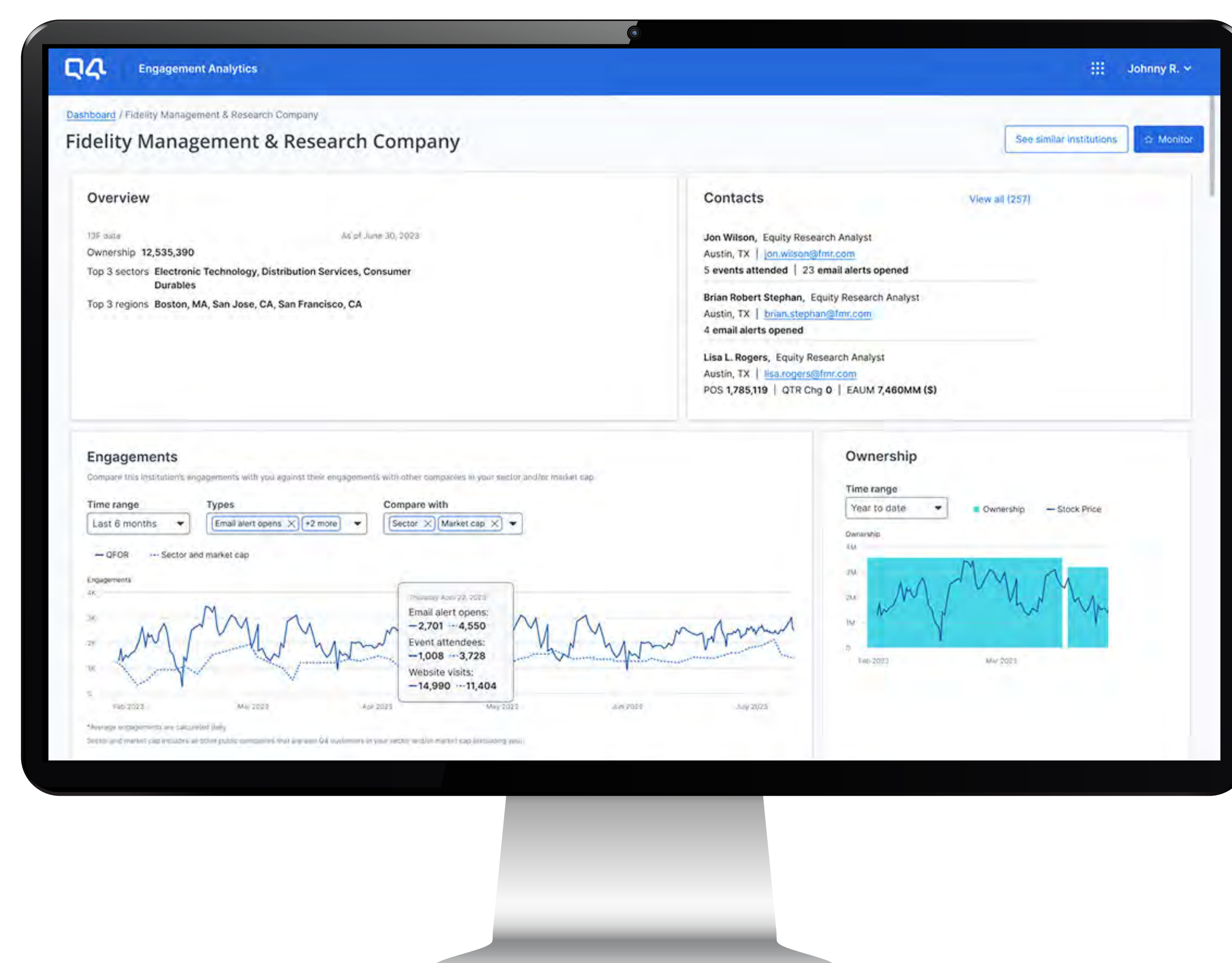
Proactive Issue Management: By tracking investor actions, you can identify potential concerns or emerging issues early on and address them proactively. For example, increased downloads of governance reports or website activity from a known activist could signal potential activist interest, allowing you to prepare and engage proactively.

How is behavioral data collected and analyzed?

Behavioral data is collected through various channels, including:



This data is then analyzed to identify patterns and trends in investor behavior. For example, you might discover that investors who frequently download your financial reports are more likely to attend your earnings calls.



Engagement Analytics: Measuring Investor Interactions

Engagement analytics goes deeper than just observing actions; it focuses on how investors interact with your company. It measures the level of interest, attention, and participation investors demonstrate in response to your communications and initiatives.

Why is measuring investor engagement crucial?



Gauge Communication Effectiveness:

Engagement metrics provide a more nuanced understanding of investor interest than simple website visits or email opens. They help you assess which communication channels and content are most effective. For instance, tracking how long investors spend on specific pages of your website can help you understand which content is most engaging.



Identify Areas for Improvement:

By analyzing engagement data, you can identify areas where your communication can be optimized to better resonate with your target audience. For example, if you see that investors are not engaging with your email newsletters, you can experiment with different formats, content, or sending frequencies.



Demonstrate ROI:

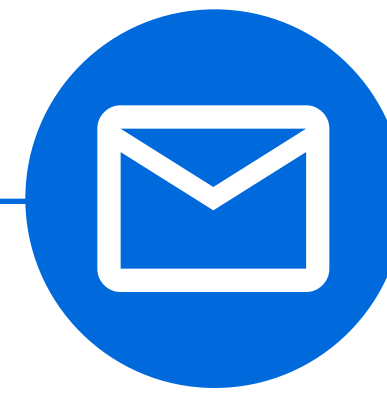
Engagement metrics can be used to demonstrate the impact of your IR activities and show how they are contributing to your overall goals. This can be particularly valuable when communicating the value of your work to senior management.



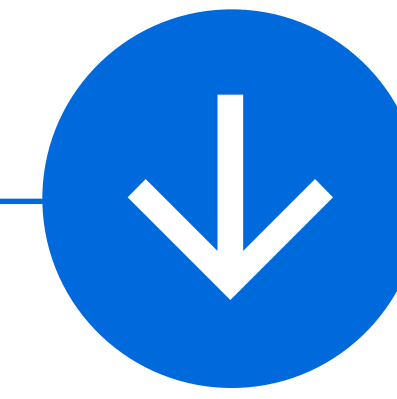
Examples of engagement metrics:

**Event participation:**

Measure attendee growth between events to identify fresh interest.

**Email alert engagement:**

Identify which emails are getting the most traction with your audience.

**Downloads:**

Uncover which institutions are interested in specific content.

By analyzing engagement data, you can identify which content resonates most with investors, which communication channels are most effective, and how to optimize your IR strategy for maximum impact.

Chapter 3: Reaping the Rewards: Benefits of Behavioral and Engagement Analytics

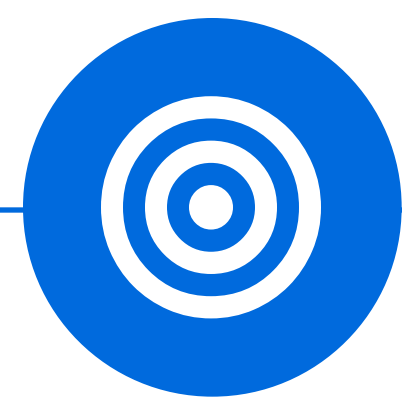
Now that you understand the foundations of behavioral analytics, let's explore the tangible benefits they offer to investor relations professionals. By harnessing the power of these tools, you can transform your IR strategy, optimize your efforts, and achieve greater success in connecting with investors and driving value for your company.



Connecting with the Right Investors Faster

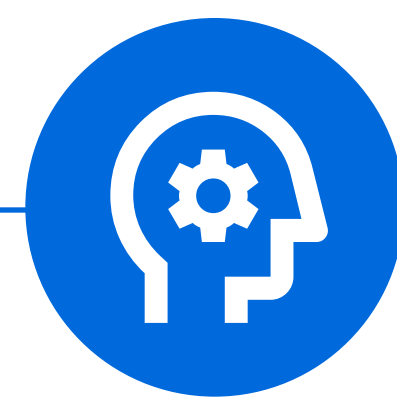
In today's fast-paced market, time is of the essence. Behavioral and engagement analytics empower you to identify high-potential investors quickly and efficiently, ensuring you focus your efforts on those most likely to engage and invest.

How do analytics help you identify the right investors?



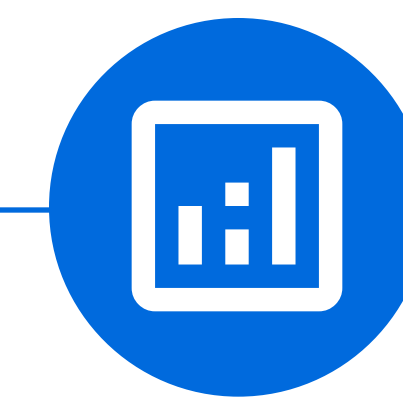
Pinpointing Interest:

By analyzing website traffic, content downloads, and event attendance, you can identify investors who are actively engaging with your company and showing genuine interest in your story.



Understanding Preferences:

Understanding which pages investors are visiting and the files they are downloading provides insight into their interests so that you can personalize outreach accordingly.



Predictive Analytics:

Advanced analytics can identify institutions who are most likely to invest based on their engagement patterns, allowing you to prioritize outreach and optimize your time.

Efficiency Gains and Personalized Communication

The benefits of identifying the right investors extend beyond simply saving time. By focusing your efforts on a targeted audience, you can:



Personalize your communication:

Craft messages that resonate with individual investors, addressing their specific interests and concerns.



Increase engagement rates:

Improve email open rates, click-through rates, and event attendance by delivering relevant and timely information.



Build stronger relationships:

Foster deeper connections with investors by demonstrating a genuine understanding of their needs and preferences.

Measuring Awareness of Your Investor Story



Engagement analytics provide valuable insights into the reach and impact of your investor communications, allowing you to measure awareness of your investor story and identify areas for improvement.

Key Metrics for Measuring Awareness



Website Traffic:

Track the number of visitors to your investor relations website and identify which pages are most popular. This provides insights into the overall reach of your online presence.



Content Downloads:

Monitor the number of downloads of key documents like annual reports, presentations, and press releases. This indicates investor interest in specific information.



Email Open and Click-Through Rates:

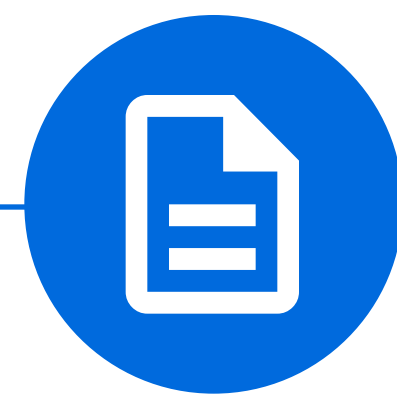
Monitor the performance of your email campaigns to understand which messages are most effective and which investors are most engaged.

By analyzing these metrics, you can gain a clear understanding of how your investor story is being received and identify areas where you can improve your communication strategy.

Uncovering What Investors Care About

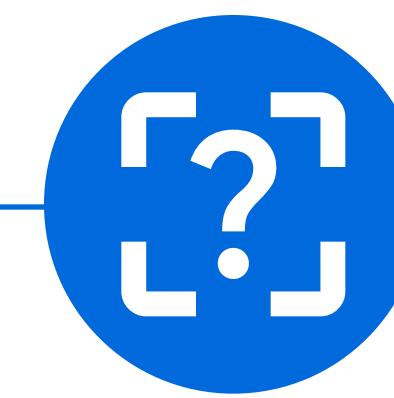
Engagement analytics provide valuable insights into the reach and impact of your investor communications, allowing you to measure awareness of your investor story and identify areas for improvement.

How does behavioral data reveal investor priorities?



Content Consumption:

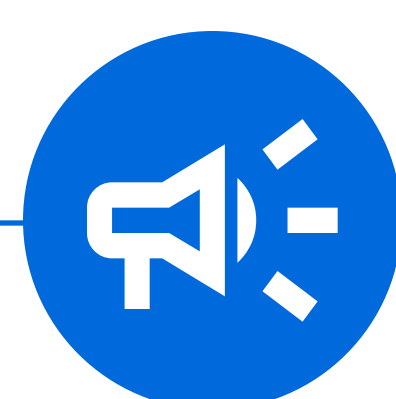
By analyzing which pages investors are visiting on your website, which documents they are downloading, and which topics they are engaging with on social media, you can identify the themes and issues that are most important to them.



Event Q&A:

Pay close attention to the questions investors are asking during webinars and conferences. This reveals their areas of focus and potential concerns.

By understanding what investors care about, you can:



Refine your messaging:

Craft communication that addresses their specific interests and concerns.



Proactively manage issues:

Identify potential concerns early on and address them proactively before they escalate.



Build trust and credibility:

Demonstrate a genuine understanding of your investors' needs and priorities.

Chapter 4: Expanding Your Reach and Safeguarding Your Company: Proactive IR with Engagement Analytics

While connecting with existing investors and high-potential prospects is crucial, expanding your reach to new audiences and proactively managing potential threats can significantly benefit your company's growth and stability. Engagement analytics can play a key role in both broadening your investor coverage and safeguarding your company from activist investors.

The Value of Wider Coverage

Increased investor coverage translates to:

1

Increased Liquidity: A broader investor base typically leads to increased trading volume and liquidity for your company's stock, making it more attractive to potential investors.

2

Reduced Volatility: A diversified shareholder base can help mitigate stock price volatility, as it reduces the impact of individual investors' trading decisions.

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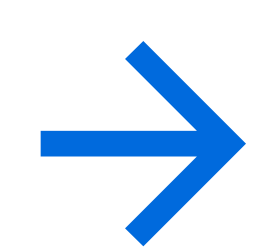
Enhanced Company Valuation: Wider investor coverage can lead to a higher valuation for your company, as it increases demand for your stock and reflects a broader recognition of your company's value proposition.

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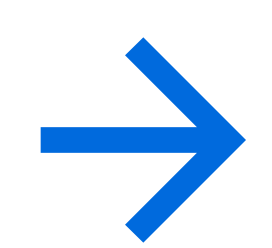
Stronger Market Position: A diverse investor base can enhance your company's reputation and credibility in the market, strengthening your overall position.

Leveraging Analytics to Expand Coverage

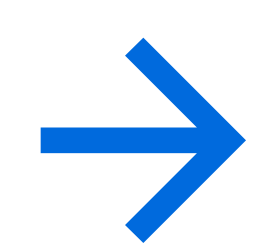
Engagement analytics provide valuable insights that can help you expand your investor coverage:



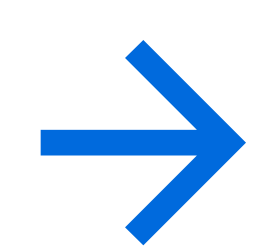
Identify Untapped Investor Segments: By analyzing website traffic, content downloads, and event attendance, you can identify investor segments that are currently underrepresented in your shareholder base.



Tailor Content to Attract New Audiences: Understand the interests and preferences of different investor segments and create targeted content that resonates with their specific needs.



Optimize Communication Channels: Analyze engagement data to identify the most effective channels for reaching different investor segments. This may involve leveraging social media, email campaigns, webinars, or targeted advertising.



Monitor Industry Trends: Track engagement with industry reports and news to understand the broader investor landscape and identify potential opportunities for expanding your reach.



Proactive Outreach to Analysts and Media

Engagement analytics can also help you identify and connect with key influencers in your industry, such as analysts and journalists, who can help amplify your company's story and attract new investors.

Identify Key Influencers:



Track engagement with your company's online content to identify analysts and journalists who are showing interest in your company or industry.

Proactive Engagement:



Reach out to these influencers with personalized communication, offering them valuable insights and access to key information.

Build Relationships:



Cultivate relationships with these influencers to ensure your company's story is accurately represented and reaches a wider audience.

The Power of Third-Party Validation

Expanding your investor coverage often involves leveraging third-party validation to build credibility and attract new investors.

Analyst Reports:

Encourage analyst coverage of your company by providing them with access to information and insights.

Media Coverage:

Secure positive media coverage by proactively engaging with journalists and sharing your company's story.

Industry Awards and Recognition:

Highlight any awards or recognition your company receives to build credibility and attract attention.

Preparing for Activists: Early Detection and Proactive Engagement

In today's environment, proactive activism management is essential for every public company. Engagement analytics can provide the early warning signs you need to prepare for and mitigate potential threats.

☒ **Detect Early Interest:**

Monitor website traffic, content downloads, and event attendance to identify unusual activity that may signal activist interest. For example, a sudden increase in downloads of your corporate governance reports or executive compensation data could indicate potential activist scrutiny.

☒ **Proactive Engagement:**

If you detect early signs of activist interest, engage with the investor proactively to understand their concerns and address them before they escalate.

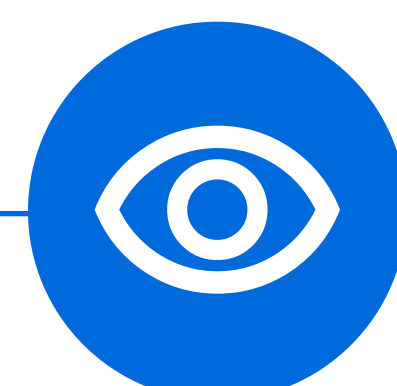
Benchmarking Your IR Program Performance

Engagement analytics allow you to benchmark your IR performance against industry peers and identify areas for improvement.



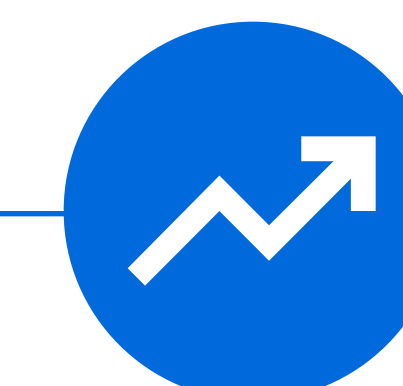
Track Key Metrics:

Monitor website traffic, content downloads, event attendance, and social media engagement to understand how your performance compares to other companies in your industry.



Identify Best Practices:

Learn from the success of your peers and adopt best practices to enhance your own IR strategy.



Continuous Improvement:

Use data-driven insights to continuously improve your IR program and ensure you are meeting the evolving needs of your investors.



Chapter 5: AMD Case Study: Leveraging Intelligent Insights to Deliver Strategic Value

Advanced Micro Devices (AMD), a global semiconductor giant, understands the importance of staying ahead in the competitive tech landscape. For their Investor Relations team, this means ensuring that Wall Street accurately understands their evolving business and that they attract the right shareholders for their long-term value proposition.

AMD has leveraged Q4 Surveillance for well over a decade to achieve these goals. Here's how this partnership has helped them deliver strategic value:

Gaining Visibility in a Complex Market

AMD's surveillance goals are threefold:

- ➔ **Understanding their stock trading:** Gaining a deep understanding of the factors driving AMD's stock movements is crucial for implementing an agile IR strategy.
- ➔ **Understanding the overall markets:** Staying informed about broader market trends allows AMD to anticipate potential impacts on their stock and adjust their communication accordingly.
- ➔ **Communicating key insights:** Effectively communicating timely intelligence to senior management and the Board of Directors supports strategic planning and decision-making.

Actionable Insights and Strategic Value

Q4 Surveillance provides AMD with:

- ➔ **Deep market understanding:** Q4's proprietary reports and expert analysts provide invaluable insights into market trends and trading movements, allowing AMD to anticipate potential fluctuations and adjust their strategy accordingly.

- ➔ **Predictive capabilities:** Q4's analysts help AMD predict future stock movements based on historical trading metrics and options intelligence, allowing them to proactively address investor expectations and communicate effectively with the Board.
- ➔ **Strategic planning support:** Q4 Surveillance plays an essential role in AMD's strategic planning, helping them understand what's driving movement in their stock and ensuring they are communicating the right message to the right people.

The Value of Partnership

For AMD, the partnership with Q4 goes beyond just data and technology. The expertise and dedicated support of their Q4 analyst have been invaluable in navigating the complexities of the market and achieving their IR goals.

Key Takeaways from the AMD Case Study:



The right tools make a difference:

Investing in robust surveillance and engagement analytics platforms can provide critical insights for strategic IR planning.

Expert support is essential:

Partnering with experienced analysts who understand your industry and company can significantly enhance the value of your analytics tools.

Proactive communication is key:

Using insights to anticipate market movements and communicate effectively with stakeholders can help you achieve your IR goals and drive long-term value.

Chapter 6: Implementing Behavioral and Engagement Analytics in Your IR Strategy

Now that you understand the power and potential of behavioral and engagement analytics, it's time to put that knowledge into action. This chapter provides a practical guide to implementing these tools in your IR strategy, from setting clear goals to continuously improving your approach.

Getting Started: Laying the Foundation for Success

Before diving into implementation, it's crucial to establish a solid foundation. This involves:



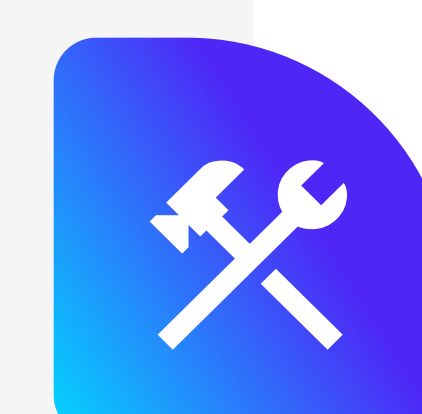
Setting Clear Goals:

Define your specific objectives for using behavioral and engagement analytics. What challenges do you aim to address? Are you looking to increase investor engagement, improve targeting, or address proactively activist situations? Clearly defined goals will guide your implementation and help you measure success.



Selecting the Right Tools:

Choose a platform that aligns with your goals and offers the necessary features, such as data collection, analysis, reporting, and investor targeting. Consider factors like ease of use, scalability, and integration with your existing systems.



Data Collection and Analysis: Building Your Knowledge Base

Accurate and consistent data is the lifeblood of any successful analytics initiative.

This involves identifying relevant data sources, implementing tracking tools, and establishing data governance processes.

☑ **Establish Data Governance:**

Implement processes for data cleaning, validation, and security to ensure the accuracy and reliability of your data. This includes establishing clear data ownership, defining data quality standards, and implementing data security measures.

☑ **Identify Relevant Data Sources:**

Determine which data sources will provide the most valuable insights into investor behavior. This may include website traffic, email engagement, event attendance, social media activity, and investor interactions with your online content.

☑ **Implement Tracking Tools:**

Choose appropriate tools to collect and track behavioral data. This could involve website analytics platforms, email marketing software, event management systems, and specialized investor relations platforms.



Actionable Insights: Turning Data into Results

Once you've collected and analyzed your data, it's time to translate it into actionable insights that drive your IR strategy. This involves identifying patterns, trends, and correlations that can inform your decision-making.

Examples of actionable insights:



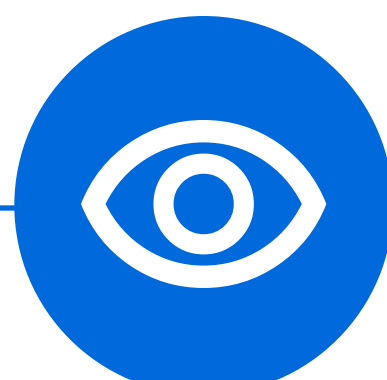
Identify High-Potential Investors:

Pinpoint investors who are actively engaging with your company and prioritize outreach to them. For example, investors who frequently visit your website, download your reports, and attend your events are demonstrating a strong interest in your company.



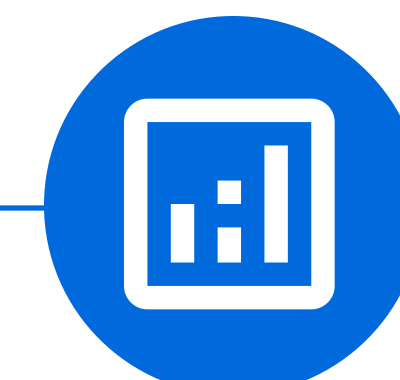
Tailor Your Communication:

Craft personalized messages that resonate with specific investor segments based on their interests and preferences. If you notice that a particular investor segment is highly engaged with your ESG content, you can customize your outreach to focus on your company's sustainability initiatives.



Proactively Address Concerns:

Identify potential issues or concerns early on and address them proactively. For instance, a sudden increase in downloads of your corporate governance reports could signal investor concern in this area, prompting you to proactively communicate your governance practices.



Measure the Impact of Your IR Activities:

Track the performance of your IR initiatives and make data-driven adjustments to improve your results. This could involve analyzing the correlation between specific IR activities, such as email campaigns or investor events, and key metrics like website traffic or investor meetings.



Continuous Improvement: Staying Ahead of the Curve

The world of investor relations is dynamic and ever-changing. To stay ahead, it's essential to continuously review and update your analytics strategy. This involves regularly monitoring your data, identifying new trends, and adapting your approach to meet the evolving needs of your investors.

Key steps for continuous improvement:

1

Regularly Review and Update Your Analytics Goals: As your company and the market evolve, reassess your goals and priorities for using analytics.

2

Monitor Industry Trends: Stay abreast of the latest trends and best practices in behavioral and engagement analytics by attending industry events, reading industry publications, and engaging with thought leaders.

3

Experiment with New Tools and Techniques: Explore new technologies and methodologies to enhance your analytics capabilities. This could involve adopting AI-powered analytics tools, incorporating predictive modeling, or experimenting with new data visualization techniques.

4

Seek Feedback from Your Team and Investors: Gather input from your colleagues and investors to continuously improve your IR strategy. Conduct surveys, hold focus groups, and solicit feedback during investor meetings to understand their needs and preferences.

Conclusion

Embrace the future of investor relations—a future powered by data and driven by insights. By integrating behavioral and engagement analytics into your IR strategy, you can transform your approach, optimize your efforts, and achieve unprecedented success in connecting with investors and driving value for your company.



This means increased efficiency and ROI, allowing you to focus your resources on the investors most likely to engage. **It means personalized communication that resonates with individual investors, fostering stronger relationships and deeper connections.** It means proactive issue management, empowering you to identify and address potential concerns before they escalate. And ultimately, it means data-driven decision-making, enabling you to measure your impact and continuously improve your IR program.

With engagement analytics, you can:

**Identify your ideal investors:**

Pinpoint those who are genuinely interested in your company and its story.

**Craft compelling narratives:**

Secure positive media coverage by Tailor your communication to resonate with individual investor preferences and needs.

**Build stronger relationships:**

Cultivate deeper connections with investors through personalized outreach and engagement.

**Proactively manage risks:**

Detect early warning signs of investor concern or activist interest and address potential issues before they escalate.

**Measure your success:**

Track the impact of your IR activities and make data-driven decisions to optimize your strategy.



The Q4 Advantage

The Q4 Platform provides a comprehensive suite of tools to help you implement this data-driven IR strategy. Our Engagement Analytics solution offers:

✓ Investor Website and Content Analytics:

Track website traffic, content downloads, and investor interactions to understand investor behavior and preferences.

✓ Email Analytics:

Monitor email open rates, click-through rates, and responses to gauge the effectiveness of your email campaigns.

✓ Event Analytics:

Analyze event registration and attendance data to understand investor interest and engagement.

✓ Institutional Investor Profiles:

Access detailed profiles of institutional investors, including their ownership data, contact information, and engagement history.

✓ Activist Risk Classification:

Identify potential activist threats and anticipate and mitigate risks.

✓ Peer Benchmarking:

Compare your IR performance to industry peers and identify areas for improvement.



With Q4, you can gain a 360-degree view of your investors, adapt your investor narrative, and optimize your IR strategy for maximum impact.



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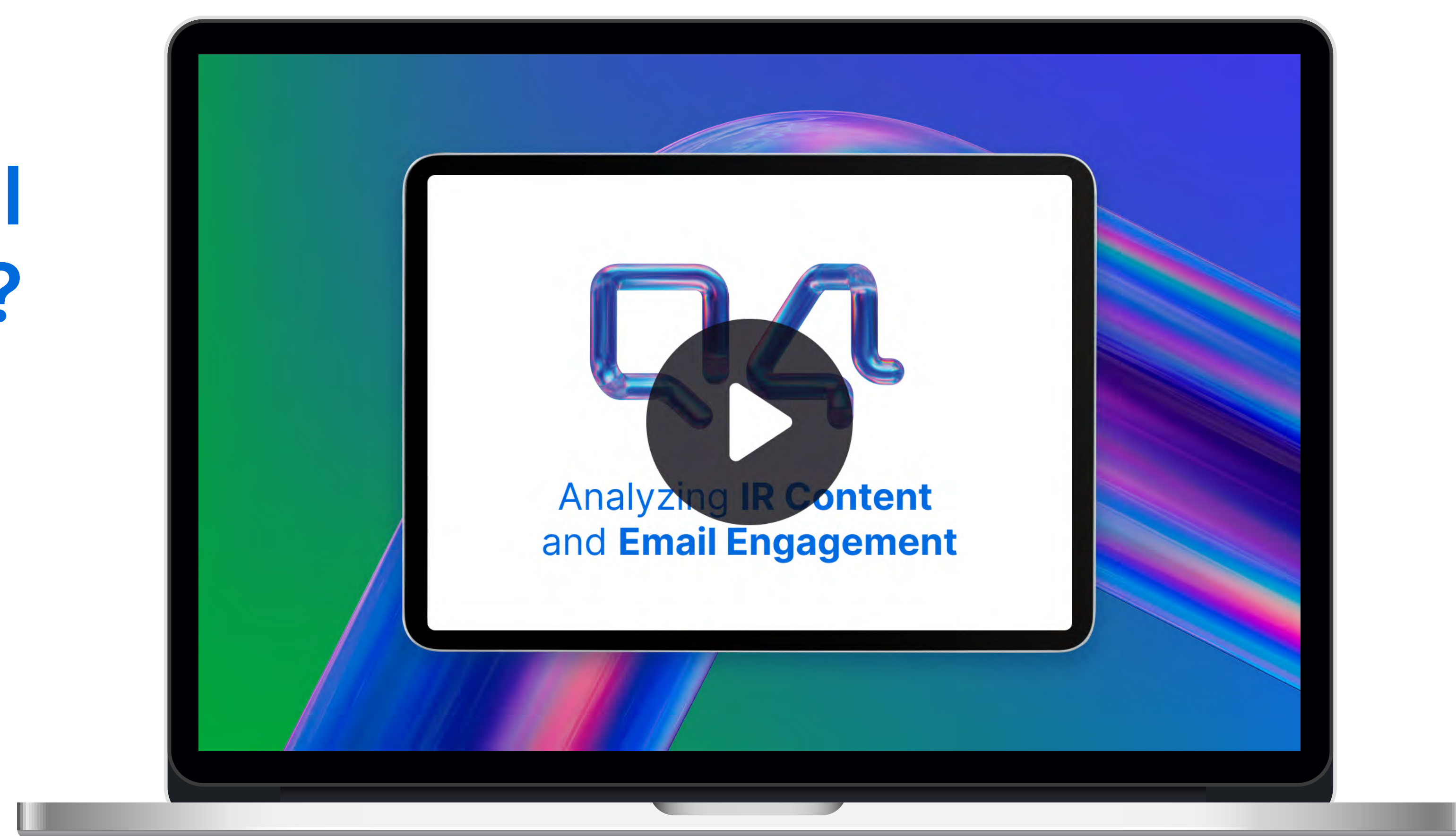
Q4’s engagement analytics tool has become a key part of our overall IR efforts. We leverage the tool weekly to enhance our understanding of investor engagement with our company. Specifically, we use EA to track ongoing investor interest, to complement our surveillance and targeting efforts, and as a way to proactively identify potential activism. We have found value in our use of EA and look forward to Q4’s continued investment in furthering the tool’s capabilities in the years to come.

”


Large US Retailer

Ready to reach the full potential of your IR program?

Request a personalized demo today and discover how Q4 can transform your IR strategy.



Want to see engagement analytics in action?





 **Download** our case study to learn more about how AMD leveraged Q4 solutions for IR success.

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)