

10 ACTIONS TO IMPROVE SHAREHOLDER ENGAGEMENT

FOR CORPORATE GOVERNANCE & IR PROFESSIONALS



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Overview

The COVID-19 pandemic will eventually come to an end, but some of the changes that it has brought about will endure for years to come. Corporate governance and investor relations (IR) professionals are updating their shareholder engagement strategies in response.

Restrictions on travel and physical gatherings accelerated investments in new technology, such as virtual shareholder meeting (VSM) and digital platforms. The combination of time away from work, government support checks and new trading apps have changed the demographic profile of investors. In light of these changes, we recommend 10 actions—segmented into what to start, stop and continue doing—to better serve your shareholders now.

Start

1. **Embrace the shift to digital.** Most listed companies held VSMs during the pandemic and now use digital platforms to manage shareholder engagement.
2. **More is more, but be smart and succinct.** Communicate with shareholders more often and throughout the year. Focus on one topic at a time to manage your input.
3. **Consider going hybrid for your next shareholder meeting.** VSMs enabled issuers to deliver shareholder meetings when the pandemic prevented travel. Some investors want a return to physical meetings, while others prefer the flexibility of remote access. Satisfy both groups with a hybrid format.
4. **Take advantage of your new tech.** Make full use of VSM features to enrich the shareholder meeting experience. Bring the meeting to life by putting execs on video, offering interactive chat and instant polls, setting up virtual/physical breakout rooms, and handling questions and proxy voting electronically.
5. **Improve VSM access and security with the Digital Legal Proxy (DLP).** Mediant created the DLP that replicates a traditional legal proxy, making it easier for beneficial shareholders to securely participate and vote in virtual annual meetings. This has been adopted by most VSM providers, so be sure that yours is signed up to it.

Stop

6. **Call time on one-size-fits-all.** We live in an age of personal choice and public companies are not immune to this expectation. Traditional printed documents—long, complex and typically mailed to investors—are inadequate when the needs and wishes of shareholders are so varied. The same goes for physical-only shareholder meetings, which now look restrictive after so many investors have experienced VSMs.
7. **Forget old-fashioned content styles.** Bring your documents to life with imagery, charts and approachable language. Make your content pop, from impactful print visuals to digital features such as animations and video.

Continue

8. **Take your time with new tech.** Many issuers acquired new technology in a hurry in 2020, but adopting new tech has always been part of engaging shareholders. Allow yourself the time and space to learn and apply new features.
9. **Stay on top of regulatory changes.** Regulators are responding to changes in technology and introducing new rules that will embed the digitization of our industry. Maintain your awareness not only of forthcoming regulation, but also of how it is taking shape.
10. **Make shareholder engagement fun and engaging.** Engaged shareholders typically have a better understanding of company proposals, are more likely to vote with management, and hold shares for longer. Experiment with new communications techniques – live and recorded video, interactive documents or investor roadshows.

[Learn more](#) about how Mediant can help you enhance shareholder engagement in a changed world.