



IR Tech Investment Worksheet: Cost Vs Value



Purpose

This worksheet helps Investor Relations Officers (IROs) uncover hidden costs, inefficiencies, and risks, and weigh them against the potential value of a more integrated and efficient approach. It is designed to support investment discussions with CFOs, CEOs, and boards by translating IR workflows into measurable impacts on efficiency, risk, and shareholder value.

Step 1. Where are your costs hiding?

These are the areas where current resources are consumed. Identifying them establishes the baseline cost of the status quo.

Direct costs

- ☐ Multiple vendors for earnings calls, websites, CRM
- ☐ High fees for webcast or event providers
- ☐ Ongoing consultancy or agency reliance

Time & headcount

- ☐ Long prep cycles for earnings, board, and investor meetings
- ☐ Manual note-taking and rework in reporting
- ☐ Bandwidth consumed by repetitive, low-value tasks

Manual effort

- ☐ Handwritten or unstructured investor notes
- ☐ Manual peer earnings call summaries
- ☐ Spreadsheet-driven reporting and tracking

Risk exposure

- ☐ Sensitive documents still sent via email
- ☐ Risk of disclosure errors or reputational slip-ups
- ☐ No alerts for activist or unusual investor behavior



Step 2. Current vs ideal future state

For each workflow, capture your current state and what the ideal future state would look like with better tech. The gap highlights the investment delta, the value case for new tech.

Workflow	Current state (Today)	Ideal future state (With better tech)
Earnings prep	Days drafting scripts manually	1 hour with AI-generated first draft
Peer research	Manual note-taking and summaries	Instant AI summaries of peers’ calls
Investor meetings	Briefing books created from scratch	Auto-generated profiles & engagement data
Board / exec reporting	Days compiling updates manually	AI-driven summaries in minutes
Website updates	Vendor-dependent, delayed changes	Self-service edits live in minutes
Risk	Exposure to early disclosure and late activist detection	Centralized release scheduling and proactive activist alerts
Compliance & security	Sensitive documents sent over email, no secure audit trail	SOC2-secure workflows with controlled access

Step 3. Missed opportunities tracker

Each box checked here represents value left on the table. These are activities CFOs and CEOs expect IR to deliver, but inefficiencies often push them aside.

Use this checklist to demonstrate how the right investment frees capacity for higher-value work.

- ☐ Investor targeting and outreach
- ☐ Proactive engagement with analysts and shareholders
- ☐ Building stronger ESG and IR narratives
- ☐ Early-warning activism detection
- ☐ Executive and board alignment on strategy



Step 4. Investor & market impact

Team workflows directly shape how investors, analysts, and the market perceive the company. Strengthening processes lowers financial and reputational risk and reinforces the case for investment.

- **Investor sentiment:** Are we seen as reliable, transparent, well-prepared?
- **Market reputation:** Have errors or delays eroded credibility?
- **Analyst relationships:** Do analysts feel they get timely, consistent insights?
- **Shareholder value:** Could weak communications influence long-term trust and investment decisions?

Step 5. Flexibility & future readiness

For each capability, rate the importance (how critical this is for our IR strategy) and **current maturity** (how well we deliver it today). The biggest gaps point to the strongest investment cases.

Strategic capability	Description	Importance (L / M / H)	Current Maturity (L / M / H)
Integration across systems	Ability to connect IR tech with finance, legal, and comms for unified data and workflows	☐ L ☐ M ☐ H	☐ L ☐ M ☐ H
Resilience under pressure	Confidence that earnings events and disclosures perform reliably under high-stakes or high-volume conditions	☐ L ☐ M ☐ H	☐ L ☐ M ☐ H
Future regulatory alignment	Readiness for evolving disclosure rules, ESG requirements, and digital accessibility standards	☐ L ☐ M ☐ H	☐ L ☐ M ☐ H
Global reach	Flexibility to engage investors across regions, time zones, and regulatory environments	☐ L ☐ M ☐ H	☐ L ☐ M ☐ H
Data leverage	Ability to use engagement analytics and AI insights to shape long-term investor strategy	☐ L ☐ M ☐ H	☐ L ☐ M ☐ H



Step 6. Action priorities

Turn insights into a **roadmap for investment**. This links quick wins to longer-term transformation, showing leadership where investment delivers impact now and how it builds future value.

Area	Quick win	Medium term	Strategic transformation
Earnings prep & scripts	☐	☐	☐
Investor meetings	☐	☐	☐
Risk management	☐	☐	☐
Targeting & engagement	☐	☐	☐
Board/exec reporting	☐	☐	☐

Step 7: Benchmark against Forrester’s TEI analysis

Forrester’s Total Economic Impact™ study found that a lean IR team using the Q4 Platform™ achieved a **212% ROI with payback in under six months**, saving more than **1,100 hours annually** across earnings prep, meeting briefings, and board reporting. Beyond time savings, the team reduced the risk of early disclosure and strengthened investor confidence with secure, integrated workflows.



As one director of investor relations interviewed for the study shared,
“The IR team is now more efficient and effective, with the ability to focus on more strategic initiatives like targeting and investor engagement.”

Learn how you can unlock \$424K in savings and a 212% ROI for your IR team

Get Forrester's TEI report



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.

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