

Getting more from your annual report.

The trend is clear. Annual reports are evolving to meet the needs and expectations of increasingly sophisticated audiences who demand greater control over when, where and how they access information. SEC requirements have also steered the direction of annual report design by requiring the presentation of content “in a format, or formats, convenient for both reading online and printing on paper.” With regard to e-proxy materials, the SEC touts using functionality to optimize searchability, navigation, usability and onscreen readability—key features of successful and compliant online reports.

Now more than ever, you must create effective investor materials in sync with evolving regulations, technologies and end-user needs. The annual report and its related communications, including websites, corporate overviews, fact sheets, investor kits, road show presentations, meetings and webcasts, have become critical means to broader ends:

- Proactively positioning yourself to multiple stakeholders across touch points
- Sharing your most important stories to enlighten and engage, as well as to enrich what you are expressing through other vehicles
- Clarifying and refining your messages to enhance your reputation and build your brand

For maximum impact, treat these communication opportunities as independent but interconnected vehicles with unique requirements, all working in tandem to build a differential of attraction, engagement and value.

BUILD ATTRACTION

Attract the attention of your audiences with compelling content. Remember three key things to create content that rings true, resonates and sticks:

1. Address what investors need and want to know.
 - Why you exist
 - What sets you apart
 - How you make money
 - Your drivers
 - Leadership strength
 - Your growth strategies
2. Link your tangible and intangible assets—your investible qualities.
 - Profit streams
 - Market need
 - Growth potential
 - Financial position
 - Intellectual property
 - Strategy and business model quality and execution
 - Management experience and credibility
 - Innovativeness
 - Ability to attract top talent
 - Social responsibility
 - Brand strength and equity
3. Move minds through a voice that is real and distinctly yours.
 - To take charge of your brand and reputation
 - To speak about things that not only inform, but also influence perceptions in your favor

BUILD ENGAGEMENT

Annual reporting is a prime opportunity to reach diverse audiences, from shareholders, the financial community, industry peers, government regulators and the media, to business partners, customers and your employees. And we do so in different ways—print, online, video and live engagements.

While messages should be consistent across communications, you should prioritize and tailor them for the audience and situation. We must also optimize and mold them to the medium for greatest impact while leveraging critical content and assets for continuity. Whether delivered through traditional outbound channels focused on finding audiences, or through newer in-bound techniques focused on being found, these stories should individually stand on their own, and collectively, contribute to a richer, ongoing narrative about your company. You can also invite participation along the way, fostering dialogue to strengthen your resonance, relevance and reach.

BUILD VALUE

Building attraction and engagement across audiences, media and channels creates greater value. You not only maximize your dollars, but also your return on objectives.

The results can be profound:

- Deepening understanding of your business and point of view
- Setting yourself apart from your competition to achieve better business outcomes
- Building credibility and trust with stakeholders who shape your company's success

Ultimately, using your annual report to *do more* will help you *get more*.

Baker is a brand communications design firm.