



Every Company in America Needs Closer Ties to Its Investors.

Stronger Investor Engagement → Stronger Share Price

The Open Perception Study™

Since 2001

Helping clients identify sources of investor skepticism...

...and build acceptance for the shares.

The Power of Asking: Flipping the Script in Investor Relations.

Artificial Intelligence can tell you many things, but not what an investor thinks.

What happens when you reverse the Management - Investor dynamic...

. . .when management, through an intermediary, asks questions of the investors?

Management can identify the skepticism and misunderstandings that depress value.

It gains the ability to design communications strategies that resolve the dissonance.

The resulting clarity in investors' views facilitates a stronger share price.

But the path to getting there remains unchanged: Management has to ask. . .

. . .and there is one most effective way of asking:

The Open Perception Study™

Helping Clients Support Share Price through Targeted Communications.

Global Clientele

Semiconductor Computing and Graphics Technology

Semiconductor Manufacturing Equipment

National News and Media

Oil Exploration

Oilfield Services

Subsea Oil Exploration

Industrial Manufacturing

International Commercial Real Estate

Optical Networking Solutions

Client Intermediaries include Hedge Funds and Management Consultants

The Open Perception Study™

Philosophy:

Principle #1: Depth of Engagement.

Engagement with Client to map the project & build a Questionnaire that elicits hidden investor opinion.

Engagement with Investors to draw out previously unexpressed concerns and possible solutions.

Principle #2: Emphasis on what's valuable, not what's easy.

No shortcuts. ("1-to-5" ratings and industry data contribute little insight on your company.)

No rote Q&A. Concentration on extended conversations. Answers lead to more questions.

Principle #3: Special strategies that maximize value for every client.

Consultation with the IRO throughout the process, including same-day review of "sensitive" material.

Unlimited personal consultation on application of Findings of the Study.

Targeted Reports for internal constituencies: CEO, CFO, COO, CMO, PR. . .

Personal presentation of results to Management and the Board if requested.

Collaboration in drafting Perception Study Report to Board.

No cost add-ons to base project fee.

RESULT: Raises IRO's platform as valued markets advisor to Management and the Board.

An Open Perception Study™ Can Show You. . .

The Investor Decision Framework.

How do your investors determine fair value?

What comparative references, including peers, do they use when establishing price targets?

What parts of your investment story will investors pay for?

What favored parts of the management story won't move the needle? And why?

Views of Management.

Confidential views of management credibility, how they got that way, and how to improve them.

Views of disclosure practices and what they suggest about the Company's attitude toward transparency.

How can the IR Group improve its service to the investment community?

Competition / M&A.

How the company ranks among competitors – industry / investment peers, and the sector as a whole.

Investor views of possible M&A – (special technique acquires insight without ever asking the question).

The Magic of Real Engagement.

Gets answers to questions we didn't even ask – forecasting issues that will appear in ensuing quarters.

The Questionnaire

Raw Materials to Build on:

Qualitative views of management
Performance against guidance and expectations
Transparency and disclosure
Strategy
Technology
Execution
Competitiveness
Financial strength / strategy
Capital allocation
Investor Relations

Perennial last Question: “*What haven’t we asked you?*”

Special Application: Investor & Analyst Days.

Full event-focused Perception Study delivered 2 months ahead of time.

Enables planning of presentations with clear view of market expectations.

Follow-up Study immediately afterward among select attendees:

- Identifies what went well.

- What could have gone better.

- Suggestions for next time.

- Outstanding questions still to be addressed.

- (No additional fee for follow-up Study.)

Report to the Client.

Reports are designed for accessibility at any level of detail—from a “30,000-foot view” to deeply nuanced, detailed analysis.

An Executive Summary presents key Findings.

Each major theme receives its own chapter. Examples: Management, Strategy, Capital Allocation, etc. Generally 12-15 chapters in a Study.

Each chapter introduced by a series of bulleted Highlights.

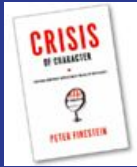
Chapters are further broken into thematic subsections, each with its own introduction.

Edited quotations present thematically-sequenced viewpoints, each framed by descriptive commentary. Sources identified as buy-side / sell-side.

Open Perception Studies are 60-80 pages, including suggestions for action and a section entitled “What to Ask Next Time.”

Let's Talk...

To suggest a time for a live, one-on-one conversation, [Click Here.](#)



Peter's Book: "*CRISIS OF CHARACTER—Building Corporate Reputation in the Age of Skepticism.*"
On Amazon: [Click here.](#)

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