

Conference Call Checkup

One of Our Assignments

Unlike our workshops, which require active participation from our clients, our Conference Call Analysis requires nothing from the client other than a willingness to hear constructive criticism of their conference call efforts. It's a written report we provide after listening to and evaluating a quarterly earnings conference call.

One of our clients wanted (and quite frankly needed) an outsider's perspective on its conference calls. What we found were quite a few areas in need of improvement. A few examples: The call took place at 8:30 AM Eastern time; that's too early for New Yorkers (many analysts are from New York) and analysts in the other time zones would find it even more problematic. (The company is based in Texas and likely has analysts following it from Texas.) Several of the presenters' prepared remarks were too long, and the Q&A period was too short. Also, neither the CEO nor any of the other speakers gave a "characterizing statement" – a key message describing the quarter. These and other problems were identified and discussed in a 29-page confidential report (including a 2-page executive summary) submitted to the client.