Lifesavers: IRO Toolkit

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Every day, there is a new AI headline, a new application or software… As we all know, the world of artificial intelligence is vast and ever-expanding. So, amid all this noise, which tools can provide the most practical benefit to investor relations professionals and those they engage with? In this article, we look inside a realistic toolkit for IR professionals — and we have included only tools we use ourselves. This is not a collaboration, nor is it a promotion — it is merely a candid recommendation.

Circleback

Over 200 meetings with investors or analysts a year; attending conferences; organizing general assembly meetings; quarterly webcasts to connect management and investors; data gathering interviews with different departments or bodies in the organization...All sound familiar? An IR professional's regular day is filled with these encounters, where the IRO is the prime host and therefore unable to take decent notes for the benefit of all stakeholders. Circleback is a smart AI tool that takes notes, while you just focus on delivering the right message and attending to your guest / investor in the best way possible. We extensively use Circleback at every meeting and therefore extract the meeting notes right after the meeting ends. Circleback makes an executive summary out of the transcript; separately delivers matters that need to be followed up and lays out questions and answers for the ease of the reader. In addition, the AI-backed tool within the application enables you to write different prompts to extract certain subject matters that were discussed during a meeting. Who would not want to have the entire question and answer session readily available in a couple of minutes right after a heated general assembly or quarterly webcast?

Thinkcell

Are you still generating your charts, waterfalls, tables, or timelines manually via excel or word? Are you tired of the time wasted with formatting after the moment you enter the raw data? If you are in capital markets, speed is king. If you are an IR professional, delivering the message clearly and precise is queen. Thinkcell is an especially useful tool to generate charts ranging from bar charts to scatter, from doughnuts to waterfalls just in seconds. Once you save the company's corporate font and color codes at the initial stage, then the format you need is readily available with lightning speed. You do not need to be a graphic designer or ex-McKinsey to generate fancy, professional and easy-to-understand slides. All you need is Thinkcell and watching its how-to videos on YouTube, which should take only 30 minutes in total.

DeepL

If you are an IR professional working for an EM Company, it is indispensable to have all disclosures and IR engagements in dual language. In our case, we are publishing the entire communication in both Turkish and English. Timely and confidential translation are key features needed by all IR teams. At this point, DeepL comes in handy and delivers translation services momentarily that takes investor-friendly approach into account as a default provide. In addition, being a subscriber to the tool provides you with confidentiality along with offering the translation within your company's message tone.

Closir

We cannot count enough all the benefits we get from the Closir tool. Closir is not only great at keeping track of all your IR engagements through its outlook-linked CRM service, but also offers the following:

- You can **target investors** based on their AUM, geography, investment status into peers and potential match to your company's long-terms strategies.

- You can **organize webcasts or virtual meetings**. It is so user-friendly and well-organized by the Closir team that it gives you full comfort during these encounters without technical details that may complicate your life. Closir also gives freedom to your company managers in the way that they can attend and host these webcasts from anywhere in the world. All they need is to click on one link and Closir enables the rest.

- Easy to **prepare thematic roadshows**: Deal roadshows for fixed income or equity investors separately; Non-Deal roadshows, ESG-specific roadshows, and the like. Once you share the theme and any targeting preferences you may have, Closir undertakes the meeting set-ups along with logistics.

- **Perception study** is another service that I have used in the past. Closir interviews with the investors you select qualitatively via phone and prepares an executive summary and detailed report with full anonymity, thanks to which you can sincerely find out the development areas.

Basic Gen-AI tools: Chatgpt/Copilot

Of course! Not mentioning them is equal to not mentioning MS Office suite nowadays. From drafting an e-mail for an investor inquiry to transforming official earnings release materials into webcast speaker notes...Generative AI tools are handy at every step in IRO's daily workload. The utmost care must be given when using these tools; as Richard Serra once said wisely, if something is free, you are the product. Don't be one 😊

Other AI tools for IROs

While for the purpose of this write-up, I only wanted to focus on the tools I use myself and therefore recommend with no hesitation, there are couple of other interesting tools that I remotely monitor and enjoy:

- **Signal AI:** This tool is intended to track the sentiment towards your company. It covers the

external data available from traditional and social media and provides you with insights to manage risk and improve reputation.

- **BloombergGPT:** No need to mention how lifesaver the Bloomberg terminal can be for any capital markets professional, but in IRO's world, BloombergGPT tool is also handy in terms of real-time insights, sentiment, and analyst tracking.

- **NetBase Quid:** This tool is actually designed for consumer and market intelligence to understand ever-evolving trends. For IRO professionals, the tool also becomes useful for NLP-based earnings call analysis, peer benchmarking, and sentiment mapping.

What's next?

Honest answer: Sky is the limit!

Practical answer: The primary role of an IRO is to provide investors and the public with accurate and timely information. However, certain recurring tasks remain essential, such as quarterly earnings reports, frequently asked questions, and compliance with regulatory frameworks. IRO professionals play a crucial role in attracting the right investors and ensuring the optimal match between investors and companies. Likewise, offering high-quality company representation and delivering satisfactory responses to investors are indispensable responsibilities. As AI tools evolve, they will increasingly help shift IRO professionals' time from routine tasks to more strategic, high-level responsibilities, taking on a greater role in the industry. For example, AI tools could predict investor questions after quarterly earnings reports by analyzing past behavior and comparing current results with previous periods. Additionally, emerging AI technologies—such as NotebookLM—are evolving rapidly, providing podcast-style audio and video content featuring company executives or IROs to address frequently asked questions. As AI tools evolve from mere efficiency boosters to intelligent strategic partners, IROs will gain the ability to decode investor behavior, predict key concerns, and craft more impactful narratives—shaping the future of investor relations beyond just data dissemination.