

# 5 WAYS TO TAKE YOUR INVESTOR COMMUNICATIONS DIGITAL

The clarity and functionality of your portal – and the image you portray through your digital presence – can influence your ability to attract capital. To offer a clear, attractive and user friendly portal to your investors, you need to place the right digital acceleration bets.

**Follow these five steps to find out how:**

## 1 Take the opportunity to customize

If your firm has invested a lot of time and effort in building and maintaining its brand integrity, your investor portal should reflect it.

Provide a seamless investor experience with a customized portal that goes beyond just white-labeling an out-of-the-box solution.

## 2 Make sure the solution is suitable long term

During the COVID-19 pandemic, investor meetings had to radically change.

A smart and secure investor portal that can host investor conferences and livestream investor meetings will provide clients with an experience that maintains high fidelity communications no matter what future interactions look like.

## 3 Be prepared for mobile usage to return

Mobile access to investor portals may not seem as important with most people working from home. However, at some point, face-to-face investor meetings will be on-the-go again.

If your portal offers the ability to access investment data through mobile devices, your investors can get whatever information they want, anywhere, anytime.

## 4 Integrate the strongest possible security and permissioning

While easy access to investment information is the objective, remaining secure against cybercrime such as hacking is more important than ever.

A secure and robust permissioning engine ensures that only the appropriate investors see certain material, and that outsiders can't discover your sensitive information through web searches.

## 5 Keep the portal up to date

Your portal is an extension of your brand – so how do you maintain it to ensure you're always at your best? The digital materials, promotional content and information you share need to be current.

But this doesn't have to be an arduous task. The right tech partner can offer managed services to maintain and update all the engaging content that you want to provide, with no work on your part.

**If you take a digital-first approach to your investor communications, you can ensure a seamless and enjoyable investor experience for your clients while protecting the integrity of your brand.**

**Let's solve digital acceleration.**

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