

EARNINGS CALL

Run-of-Show & Production Guide

Company: _____ Ticker: _____ Quarter / Period: _____ Call Date & Time: _____ Producer: _____

FORMAT RECOMMENDATION: PRE-RECORDED SCRIPTED REMARKS + LIVE Q&A

✓ WHY PRE-RECORD YOUR EARNINGS CALL

Pre-recording the scripted portion of your earnings call is strongly recommended by Streamlined Communications. Here's why:

- ▶ **Zero risk of live audio failure:** Technical issues during the scripted read are eliminated. The recording is perfect every time.
- ▶ **Executive confidence:** Leadership can review and approve the exact delivery before it reaches investors and analysts.
- ▶ **Regulatory precision:** Every word is deliberate. No missteps on forward-looking statements or material disclosures.
- ▶ **Simultaneous global distribution:** A pre-recorded segment plays identically for all time zones and replay listeners.
- ▶ **Q&A stays live:** All analyst interaction remains live — you retain authenticity where it matters most.

⚡ PRE-RECORDING CHECKLIST

Complete these steps before your recording session (minimum T-5 days):

- Legal & IR have approved all scripted remarks and forward-looking statement disclaimers
- Final script locked — no edits permitted after recording
- Recording environment confirmed: quiet room, no echo, hardwired internet
- Professional microphone or headset tested (not laptop mic)
- Recording platform dry-run completed with Streamlined producer
- Executive has rehearsed full script at minimum twice
- Backup recording method confirmed (secondary platform or local capture)
- Recorded file reviewed, approved, and stored in two locations
- Replay/playback timing confirmed with platform operator

PRE-CALL PREPARATION TIMELINE

Tasks are organized by countdown to call date. **CRITICAL** items require sign-off documentation. All deadlines are minimums — earlier is always better for earnings calls.

TIMING	OWNER	TASK	DETAIL / DELIVERABLE	PRIORITY
▶ T-21 DAYS — STRATEGIC PLANNING				
T-21	IR / Legal	Lock earnings call format decision	Choose: Pre-recorded script + live Q&A (recommended) OR fully live. Document and align all stakeholders.	CRITICAL
T-21	IR Lead	Draft analyst Q&A prep document	Pull top 10–15 questions from last 4 calls. Add anticipated questions given current quarter results.	HIGH
T-21	Platform Ops	Book webcast platform and dial-in bridge	Confirm platform capacity, recording capability, replay function, and transcript service.	CRITICAL
T-21	Legal / CFO	Begin script drafting — financial narrative	Draft scripted remarks aligned to earnings release. Include all required forward-looking statement language.	HIGH
▶ T-14 DAYS — CONTENT & REHEARSAL PREP				
T-14	Legal / IR	First script legal review	All forward-looking statements, material non-public info risks, and Reg FD compliance reviewed.	CRITICAL
T-14	IR Lead	Finalize analyst tier list	Rank all expected Q&A participants by relationship importance (see Analyst Queue section).	HIGH
T-14	Platform Ops	Configure webcast platform	Set up: registration, attendee types, Q&A queue, mute controls, recording, and replay.	HIGH
T-14	IR / Comms	Draft press release and 8-K filing	Align financial narrative in script with press release language. Confirm filing timing with legal.	CRITICAL
T-14	Prod. Team	Schedule pre-recording session	Book studio/quiet room. Confirm producer, backup capture, and script in teleprompter or printed format.	HIGH
▶ T-7 DAYS — FINAL PREP & DRY RUN				
T-7	Legal	Final script sign-off	Zero changes permitted after this point. Script locked. Legal approval documented.	CRITICAL
T-7	CFO / CEO	Script rehearsal #1	Full read-through with producer on platform. Time the delivery. Flag any awkward phrasing.	HIGH
T-7	Platform Ops	Full platform dry run with Streamlined	End-to-end test: dial-in, webcast, Q&A queue, mute/unmute, recording, transcript, replay trigger.	CRITICAL
T-7	IR Lead	Send analyst pre-call briefing	Confirm dial-in details, timing, and Q&A process with top-tier analysts. Gauge question pipeline.	HIGH
T-7	Comms	Prepare press release embargo distribution	Set embargo time. Confirm wire service. Align simultaneous 8-K filing time with legal.	CRITICAL
▶ T-3 DAYS — PRE-RECORDING & FINAL CHECKS				
T-3	CFO / CEO + Producer	PRE-RECORDING SESSION	Record scripted segment in full. Review playback. Approve final file. Store in two locations.	CRITICAL
T-3	Transcript Lead	QC pre-recorded transcript	Verify auto-generated transcript against script. Fix all speaker names, financials, and terminology.	HIGH
T-3	IR Lead	Confirm attendee registration	Review registered list: identify all analysts, media, retail investors, and unknown parties.	HIGH
T-3	Legal	Review analyst Q&A prep doc — final	Ensure all anticipated answers are legally cleared. Flag any topics requiring deflection language.	CRITICAL
▶ T-1 DAY — FINAL READINESS				

TIMING	OWNER	TASK	DETAIL / DELIVERABLE	PRIORITY
T-1	Platform Ops	Load pre-recorded file to platform	Upload, test playback start/stop, confirm replay trigger. DO NOT rely on live upload day-of.	CRITICAL
T-1	IR Lead	Final attendee list review	Flag any new registrants. Confirm analyst queue order. Brief moderator on Q&A sequencing.	HIGH
T-1	All Presenters	Final rehearsal — Q&A only	Practice live Q&A responses to top 15 anticipated questions. Time each response.	HIGH
T-1	Comms / Legal	Confirm embargo and wire timing	Verify press release wire schedule aligns with call start. Confirm SEC filing timestamp.	CRITICAL
T-1	Producer	Send final run-of-show to all participants	Distribute this document. Confirm receipt and readiness from all speakers and operators.	HIGH

ATTENDEE MANAGEMENT BY TYPE

Different attendee types require different access controls, Q&A permissions, and handling protocols. IR must classify all registrants before call day.

ATTENDEE TYPE	EXAMPLES	JOIN METHOD	Q&A ACCESS	HOW TO HANDLE
Institutional Analysts	Buy-side analysts, sell-side equity research, portfolio managers	Registered dial-in + webcast	✔ Live queue — Tier priority	Pre-registered via IR. Assigned Tier 1/2/3 in queue. Q&A moderator calls by name and firm. One primary question + one follow-up permitted. Moderator enforces time limit.
Company Executives / IR	CFO, CEO, COO, IR officer, Treasurer, Legal counsel	Secure dial-in / webcast (muted)	✘ Not in queue — internal only	All execs muted except active speakers. IR officer monitors analyst queue in real time and relays flags to moderator. Legal counsel on silent monitoring line throughout.
Financial Media / Press	Reuters, Bloomberg, WSJ, CNBC, financial journalists	Webcast listen-only (no dial-in)	✘ Listen-only — no Q&A	Media is granted webcast access only — no dial-in, no Q&A access. Do not acknowledge media by name during the call. All media inquiries directed to IR/Comms post-call. Monitor for live reporting during call.
Retail Investors	Individual shareholders, retail trading platform users	Webcast listen-only (public link)	⚠ Submit via web form only	Retail investors may submit written questions via webcast Q&A form. Moderator screens these post-analyst queue. Select 1–2 representative retail questions if time permits. Never let retail dominate the queue.
Competitors / Unknown	Unknown registrants, unverified institutional addresses	Webcast listen-only only	✘ No Q&A access	Unknown or unverified registrants are granted listen-only webcast access. Do not admit to dial-in bridge. IR reviews all registrations T-1 day and flags any suspicious or competitive parties to Legal before the call.
Rating Agencies	Moody's, S&P, Fitch analysts	Registered webcast + dial-in	⚠ Queue by request only	Rating agency analysts may be admitted to the live Q&A queue at IR's discretion. Typically limited to one question. Coordinate with CFO/Treasurer pre-call on any credit-sensitive topics.

ANALYST Q&A QUEUE — TIER SYSTEM

TIER	WHO	HANDLING PROTOCOL	TYPICAL Q STYLE	QUEUE ACCESS / LIMIT
TIER 1	Top 5 largest institutional holders; lead sell-side coverage analysts	Called first, by name and firm. IR has pre-briefed moderator on their expected topics. Highest priority, no interruption.	Multi-part questions; may reference specific slide or metric. Expects detailed answer.	Priority position in queue. 1 primary + 1 follow-up. Max 4 min total.
TIER 2	Active institutional holders; mid-tier sell-side coverage	Called in registration order within Tier 2. Moderator tracks time closely.	Single or dual questions. May probe guidance, margins, or segment performance.	Standard queue order. 1 primary + 1 follow-up. Max 3 min total.
TIER 3	Smaller holders; non-coverage analysts; first-time participants	Called only if time permits after Tier 1 and Tier 2. May limit to one question.	Often single-topic. May ask broad or non-material questions.	Queue if time allows. 1 question only. Max 2 min total.

ANALYST QUEUE MANAGEMENT PROTOCOLS

OPENING THE QUEUE

- ▶ Moderator: 'We will now open the line for questions. Analysts please press *1 to enter the queue.'
- ▶ Operator reads first analyst name and firm from queue list
- ▶ IR confirms Tier 1 analysts are at the front of the queue before opening
- ▶ Do not open queue until pre-recorded segment has fully completed
- ▶ Confirm Q&A platform and dial-in queue are both visible to moderator

MANAGING THE LIVE QUEUE

- ▶ Moderator tracks elapsed time per analyst — strict 3-4 min limit
- ▶ If analyst asks 3+ questions: 'We'll take one more from you and circle back if time permits'
- ▶ If question is outside scope: 'That's outside today's prepared remarks — IR will follow up directly'
- ▶ IR flags sensitive questions to Legal via private chat in real time
- ▶ Never let silence linger — move to next analyst within 5 seconds

CLOSING & OVERFLOW HANDLING

- ▶ If queue has 10+ analysts at 45 min mark, begin time compression
- ▶ Moderator: 'We have several analysts remaining — please limit to one question'
- ▶ At 55 min: 'We have time for two more questions'
- ▶ At close: 'We'll address remaining questions directly — contact IR for follow-up'
- ▶ IR sends written responses to all unanswered analysts within 24 hours

MINUTE-BY-MINUTE RUN OF SHOW

Times are relative to call start (0:00). **The orange section indicates pre-recorded content — executives do not speak during this segment.**

TIME	DUR.	OWNER	ACTION / SCRIPT CUE	NOTES & CONTINGENCIES
▶ PRE-CALL — T-60 TO T-5 MIN				
T-60	5m	Producer	Open platform. Admit production team and IR only. Test pre-recorded file playback start/stop.	● Confirm pre-recorded file loads correctly BEFORE any executives join
T-55	5m	IT / Ops	Full audio check: dial-in bridge, webcast stream, backup line. Test transcript activation.	Run 30-sec transcript capture test. Confirm accuracy on financial terms.
T-50	5m	IR Lead	Review final analyst queue order. Brief moderator on Tier 1 names and expected topics.	Have printed backup of analyst queue — do not rely solely on screen
T-40	5m	Legal	Legal counsel joins silent monitoring line. Confirms presence to IR via private message.	Legal must be live for entire call. Agrees on deflection language for sensitive topics.
T-30	5m	All Speakers	All executives join platform. Audio check. Confirm mute status for non-active speakers.	⚠ All execs MUTED except designated speaker. No open mic during recording playback.
T-15	5m	IR Lead	Admit pre-registered Tier 1 and Tier 2 analysts to dial-in bridge. Webcast opens for all.	Monitor attendee count. Flag any unregistered dial-in entrants to Legal.
T-10	5m	Producer	Begin holding music / title slide. Display safe harbor / forward-looking statement slide.	⚠ Safe harbor slide MUST display before any financial content begins
T-05	5m	Operator	Operator opens conference line. Reads standard opening: 'Your lines are muted...'	Confirm operator has call instructions and analyst queue handoff protocol
▶ OPENING — 0:00 TO 0:08 MIN				
0:00	1m	Producer	START RECORDING. Activate live transcript. Confirm all systems go.	● Record everything from 0:00. Transcript must be active before any speech.
0:01	2m	Operator / IR	Operator intro: call title, safe harbor reminder, format overview (scripted → Q&A), and recording notice.	Script: 'This call contains forward-looking statements... a replay will be available...'
0:03	2m	IR Officer	Introduce executive speakers: CEO, CFO (and any segment leads). Brief 1-line bio each.	Keep intros under 30 sec per person. Cue CEO with: 'I'll now turn the call over to [CEO Name].'
0:05	1m	CEO	Opening remarks framing — macro context, brief company overview, tone-setting statement.	This is the LIVE portion before pre-recording plays. Keep to prepared notes.
0:06	2m	Producer	TRIGGER PRE-RECORDED SEGMENT. CEO/CFO lines go muted. Recording plays to all participants.	● Pre-recording plays: CEO & CFO scripted remarks. Executives stay silent and on the line.
▶ PRE-RECORDED SCRIPTED REMARKS — 0:08 TO ~0:35 MIN				
0:08	~12m	[PRE-RECORDED]	CEO scripted remarks play: business highlights, strategic update, key operational metrics.	⚠ RECORDED CONTENT. Executives do NOT speak. Producer monitors playback progress.
0:20	~15m	[PRE-RECORDED]	CFO scripted remarks play: income statement, balance sheet, cash flow, guidance.	Producer tracks elapsed time. IR monitors analyst reactions in webcast Q&A panel.
0:35	1m	Producer	Pre-recording ends. UNMUTE CEO and CFO lines. Confirm live audio restored.	Test with brief 'Can you hear me?' check before Q&A opens. Do NOT skip this step.
▶ LIVE Q&A — 0:36 TO ~0:58 MIN				
0:36	1m	Moderator / IR	Open Q&A: explain format, time limits, queue instructions. Confirm operator is ready.	Script: 'We'll now open for questions. Please limit to one question and one follow-up.'
0:37	2m	Operator	Operator reads Tier 1 analyst name and firm. Unmutes their line.	IR confirms Tier 1 analyst is correct. Moderator cues: '[Name], please go ahead.'
0:39	3m	Tier 1 Analyst + Exec	Q&A exchange: analyst question, executive response, one follow-up if needed.	Producer tracks 3-min clock. IR monitors question content — flags to Legal if

TIME	DUR.	OWNER	ACTION / SCRIPT CUE	NOTES & CONTINGENCIES
				sensitive.
0:42	~15m	Q&A Moderator	Continue Tier 1 queue (2–3 more analysts). Then Tier 2 queue.	Moderator: 'Next question please, Operator.' Do NOT leave dead air between analysts.
0:57	1m	Moderator	Time call: 'We have time for one final question.'	IR scans remaining queue — select highest-priority unanswered analyst.
▶ CLOSING — 0:58 TO 1:02 MIN				
0:58	1m	CEO	Closing remarks: thank analysts, brief forward look, sign-off statement.	Script: 'Thank you for joining. We look forward to updating you on our continued progress...'
0:59	1m	IR Officer	Post-call logistics: replay details, transcript availability, IR contact information.	Script: 'A replay will be available at [URL] by [time]. Contact IR at [email] for follow-up.'
1:00	1m	Operator	Operator closes the conference line. Disconnects all dial-in participants.	Producer: do NOT stop recording until operator fully closes the line.
1:01	1m	Producer	STOP RECORDING. Confirm recording file saved. Begin transcript export.	Confirm file non-zero size. Download immediately. Store in two backup locations.
▶ POST-CALL — WITHIN 60 MIN				
Post+5	—	IR Lead	Internal debrief call: flag sensitive Q&A moments, analyst reactions, follow-up items.	Document all analyst questions for future Q&A prep updates.
Post+10	—	Transcript Lead	Begin transcript QC: financials, executive names, analyst names and firms, forward-looking language.	Cross-reference against pre-recorded script for scripted section accuracy.
Post+15	—	Legal	Review transcript for any inadvertent material disclosures. Clear for distribution.	Do NOT publish transcript until Legal clearance obtained.
Post+30	—	IR Lead	Email unanswered analysts: acknowledge their question, provide written response or schedule call.	All Tier 1 unanswered analysts contacted within 24 hours.
Post+60	—	Platform Ops	Publish replay recording and approved transcript to investor relations website.	Confirm replay link is live. Test playback. Notify IR when complete.

LIVE FAILURE CONTINGENCY PROTOCOLS

Reference in real time. Legal must be on a silent monitoring line for the full duration of the call. Earnings calls carry significant regulatory risk — never improvise.

FAILURE SCENARIO	IMMEDIATE ACTION	ESCALATE TO
Pre-recording file fails to play	Do NOT panic or attempt live re-read. Switch to live reading mode: CEO/CFO read from printed script. Producer mutes pre-recording channel. Announce: 'Due to a technical issue, we will proceed with a live read.'	Producer + IT Lead. Notify Legal immediately.
Executive audio drops during live Q&A	IR Officer: 'We're experiencing a brief connection issue — standby.' CFO dials backup line. Do not allow extended silence (>15 sec).	Producer → backup dial-in bridge
Analyst asks material non-public information question	Exec: 'That touches on information we're not able to discuss on this call — our IR team will follow up with you directly.' Never attempt to answer.	Legal counsel (silent line). IR flags immediately.
Unregistered participant joins dial-in bridge	Operator immediately places them back in hold. IR verifies identity. If unverifiable: remove from bridge. Do not acknowledge on main call.	Legal + IR Lead
Media begins live-tweeting sensitive content mid-call	Legal takes note. Do not address or respond during call. IR Comms team monitors and prepares post-call response.	Legal + Comms Lead
Transcript tool fails mid-call	Producer notes exact timestamp. Activate backup recording on secondary device. Notify Transcript Lead for manual reconstruction from audio.	Producer / Transcript Lead
Platform outage — dial-in still live	Continue call audio-only on dial-in. Webcast listeners switch to dial-in replay later. Do not stop the call — regulatory obligation to complete.	IT + Platform Vendor Support
Analyst becomes hostile or disruptive	Moderator: 'Thank you [Name], let's move to the next question.' Operator mutes their line. IR flags for follow-up offline.	Moderator + IR Lead
Legal counsel requests immediate call stop	IR Officer: 'We need to take a brief pause.' All participants muted. Legal convenes with IR/CFO offline. Resume only when cleared or officially close call.	Legal counsel. Notify CEO/CFO.

POST-CALL CHECKLIST — APPENDIX A

✓	TASK	OWNER / DEADLINE
<input type="checkbox"/>	Confirm call recording saved and backed up in two locations	Producer / Immediately post-call
<input type="checkbox"/>	Download and store raw transcript	Producer / Within 5 min
<input type="checkbox"/>	Legal review of full transcript before distribution	Legal / Within 30 min
<input type="checkbox"/>	QC transcript: executive names, financials, analyst attributions	Transcript Lead / Within 1 hour
<input type="checkbox"/>	Email written responses to all unanswered Tier 1 analysts	IR Lead / Within 24 hours
<input type="checkbox"/>	Publish approved replay recording to IR website	Platform Ops / Within 2 hours (legal cleared)
<input type="checkbox"/>	Publish approved transcript to IR website	IR Lead / Within 24 hours (legal cleared)
<input type="checkbox"/>	File 8-K with SEC if required (replay/transcript as exhibit)	Legal / Per filing deadline
<input type="checkbox"/>	Update analyst Q&A prep doc with new questions from today's call	IR Lead / Within 48 hours
<input type="checkbox"/>	Conduct internal post-mortem: what worked, what to improve next quarter	IR + Producer / Within 1 week

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