

Case Study

Shareholder Relations



Insight: Accurate shareholder intelligence wins proxy contests and improved investor relations.

With over 65 year's experience, Georgeson Shareholder Communications, a subsidiary of Computershare Plc, is the world leader in shareholder response solutions serving many of the world's largest companies. Its communication management services are honed specifically to meet the needs of the corporate investor community by maximising voter response at Annual General Meetings (AGMs), winning proxy contests and ensuring improved investor relations.

Computershare provides a complete and sophisticated campaign management service, rallying votes in favour of its client's intent. Success for such campaigns depends greatly on accurate data and rapid analytic modeling. Through the use of a call centre, shareholders are motivated to place their votes. It's here that shareholder intelligence is vital and accuracy is paramount.

Background

To embark on a campaign, Computershare depends on its client's current shareholder register for contact information. However, traditionally these databases lack shareholder telephone contact data and are not well maintained. Many shareholders may have moved, changed name or passed away. Typically, a campaign lasts no longer than a week, during which time Computershare needs to gather contact data, communicate with shareholders and assemble sufficient votes in favour of the motion to be passed. For the majority of Plcs, with numerous shareholders, this is no simple task.

Results

Matrix-Data has both the technology and the data to enable "just in time" consumer intelligence for efficient and cost effective campaign management. We provide a high match rate and accelerated campaign "swing" analysis, thereby keeping client campaign costs to a minimum and yielding optimal conversion results.

Computershare is now in a better position to profitably fulfill the current and future demands of its clients. It can embark on campaigns knowing that differing data formats and inaccurate or incomplete data need not be a barrier to a campaign's success. But, most importantly, it can see how to keep their call centres fed with the right data at the right time, without wasting calls on shareholders who have already voted or are of minimal influence to the campaign's success. In addition, using our award-winning database acceleration technology to integrate the various data formats, a single view of the 'shareholder universe' is created. Our technology is capable of updating feeds of voting data on a daily basis, matching this against previous loads, and computing lists and trends directly for our client.

Computershare is now able to plan, load, and execute campaigns in a fraction of the time previously taken. Time is money, and both savings and increased contact accuracy are paying dividends.

About Matrix-Data's Analysis Solutions

Matrix-Data has over 20 years experience working with proxy data from all the leading UK Share Registrars.

With this experience and knowledge we have developed software to clean and manage the myriad of file formats used, enabling us to automate data processing and clean and enrich the various data sources involved in shareholder management.

In partnership with other leading data suppliers, Matrix-Data offers dynamic batch file and ad hoc data verification services.

We can connect client data to a host of UK resources including our own UK investor and property databases, Experian, D&B, CACI, Royal Mail, OSIS and UK suppression files.