IR Website RFP Checklist: 10 Questions to Ask Before Choosing a Provider

Choosing an investor relations website provider involves more than comparing website designs and pricing. The provider can affect how investor information is published, how quickly your team can make updates, how earnings are supported, and how much flexibility your company has in the future.

An IR website RFP should evaluate website architecture, CMS and hosting requirements, content management, data integrations, implementation, earnings support, service, ownership, and long-term flexibility.

1. Does Your IR Website Require Us to Use Your CMS or Hosting?

Ask whether the provider requires your IR or corporate website to use its CMS, hosting environment, or website platform. If you want to retain your existing environment, confirm that the IR technology can integrate into it. B2i can integrate its IR technology into existing corporate websites without requiring companies to replace their CMS or hosting provider.

2. Can Your IR Technology Integrate Into Our Existing Corporate Website?

If your corporate website works, changing IR providers shouldn't automatically require a redesign. Ask how investor content and data will integrate into your existing website and whether the integration places restrictions on your website architecture.

3. Who Can Update Our Investor Relations Website?

Determine how much control your IR team will have. B2i supports client-managed, B2i-managed, and hybrid workflows through IROffice and our support team.

4. What Support Is Available During Earnings and After Business Hours?

Ask who you contact, whether you speak directly with a person, whether support is available 24/7, and what happens if something needs to change immediately. B2i provides 24/7 support from real people without bots, support tickets, or queues.

5. What Investor Relations Content and Data Can the Platform Manage?

Evaluate support for the content your company needs, including SEC filings, press releases, stock information, financial reports, earnings materials, events and presentations, governance content, email notifications, investor contacts, and custom IR content.

6. How Are Automated Data and Manually Managed Content Handled?

Ask whether automated and manually managed IR content can be handled within the same environment. B2i's IROffice centralizes automated and manually managed IR content within one platform.

7. How Do You Support Earnings and Other Time-Sensitive Events?

Ask how responsibilities are divided between your IR team, the IR website provider, and the conference call or webcast provider. Understand who manages updates, live-event infrastructure, last-minute changes, and escalation.

8. What Is Involved in Implementation and Migration?

Ask exactly what the provider needs from your organization, including content migration, historical investor materials, data feeds, website integrations, email subscribers, internal IT involvement, testing, and launch.

9. What Happens if We Redesign Our Corporate Website Later?

Ask whether your IR technology can adapt if you later change your corporate website, CMS, hosting provider, digital agency, or internal processes—or whether another IR platform migration would be required.

10. What Does Our Company Own?

Clarify ownership and access to the website, design, investor content, investor data, and email subscriber information. Also understand what happens to those assets if you eventually change providers.

Frequently Asked Questions

What should be included in an IR website RFP?

An IR website RFP should cover website requirements, IR content and data feeds, content management, integrations, hosting, security, implementation, support, pricing, and ownership.

How do you compare investor relations website providers?

Compare technology, flexibility, content management, integrations, implementation, support, security, hosting requirements, ownership, and cost.

Should an IR website provider host the corporate website?

Not necessarily. Companies may keep their existing CMS, hosting provider, and agency or use one provider for both. B2i supports both approaches.

Who should control updates to an investor relations website?

That depends on the IR team's preferred workflow. B2i supports client-managed, B2i-managed, and shared updates.

What support should an IR website provider offer during earnings?

Providers should have clear responsibilities, escalation procedures, and support for time-sensitive issues. B2i provides 24/7 access to real people without bots, support tickets, or queues.

Can you change IR providers without redesigning your corporate website?

Yes, depending on your existing website and the new provider's technology. B2i can integrate its IR technology into an existing corporate website without requiring a full redesign.

Who owns an investor relations website after it is built?

Ownership depends on the provider and contract and should be clarified before signing. With B2i, ownership of a website built by B2i transfers to the client upon final payment.

Preparing an IR Website RFP?

If you're evaluating investor relations website providers, B2i can show you how our technology, service model, and approach compare.