

Planning Checklist

Middle East capital markets day
planning checklist



1. Event Details

Event date:

Format (in-person, hybrid, virtual):

Location or platform:

Target investor segments:

Budget range:

Success metrics:

2. Pre-planning: Week -4 to 0

- ☐ Align senior leadership on purpose, outcomes, and links to regional growth strategies.
- ☐ Run messaging workshop to refine narrative, KPIs, and ESG commitments, including sustainability and Shariah considerations.
- ☐ Select preliminary format (in-person, hybrid, virtual) based on relationship goals in the region.
- ☐ Vet technology and agency partners for Middle East experience, bilingual support, and regulatory compliance.
- ☐ Draft high-level budget that reflects venue prestige, hospitality, and sponsorship norms.
- ☐ Gather investor sentiment in key regional markets with targeted surveys.
- ☐ Define success metrics, including analyst notes, media coverage, regional alignment, and relationship strength.

Owner/due date/notes:

3. Week 1 to 2: Define objectives and set the foundation

- ☐ Lock in date, format, and venue or platform.
- ☐ Check regional holidays and major events to avoid conflicts.
- ☐ Map format and content to investor segments such as sovereign wealth funds, family offices, and regional asset managers.
- ☐ Confirm high-level objectives (for example, regional partnership announcement, progress on regional projects, cross-border capital goals).
- ☐ Clarify strategic context (market entry, diversification, capital market milestone).
- ☐ Link success metrics to measurable outcomes such as post-event meeting requests and regional media engagement.
- ☐ Ensure no clashes with earnings announcements in home and regional markets.

Owner/due date/notes:

4. Week 3 to 4: Shape the agenda and prepare speakers

- ☐ Draft agenda that reflects global and regional priorities.
- ☐ Confirm speaker lineup, including regional leadership and subject experts.
- ☐ Prepare briefing materials with local case studies, regional data, and compliance context.
- ☐ Develop slides and scripts in English and Arabic where appropriate.
- ☐ Ensure each speaker's contribution advances the overall strategic narrative for a Middle East audience.

Owner/due date/notes:

5. Week 5 to 6: Align messages and finalize content

- ☐ Run message alignment across IR, legal, compliance, and executive teams.
- ☐ Review forward-looking statements against DFSA, CMA, or relevant jurisdictional guidelines.
- ☐ Localize visual and verbal content for Middle Eastern investors.
- ☐ Integrate visuals that highlight regional projects, partnerships, and community impact.

Owner/due date/notes:

6. Week 5 to 6: Content strategy workstream

- ☐ Plan interactive elements (bilingual Q&A, live polls) to engage diverse investors.
- ☐ Balance financial detail with narratives on innovation, ESG, and contributions to regional economic goals.
- ☐ Assign narrative owners for themes such as energy transition, fintech growth, and regional diversification.

Owner/due date/notes:

7. Week 7 to 8: Finalize logistics and test technology

- ☐ Confirm attendance from key regional stakeholders and send personalized invitations.
- ☐ End-to-end tech test for multilingual functionality and regional bandwidth.
- ☐ Create role assignment sheet, including bilingual moderators and regional PR support.
- ☐ Confirm technology partner experience in the Middle East, including live translation and data privacy compliance.

Owner/due date/notes:

8. Week 9 to 10: Rehearse and prepare materials

- ☐ Full rehearsals with all speakers, including interpretation where relevant.
- ☐ Prepare media kits for regional press and financial media.
- ☐ Train teams on engagement tools with cultural and technical guidance.

Owner/due date/notes:

9. Week 11: Final checks and Q&A readiness

- ☐ Send final reminders and confirm access for all registered attendees.
- ☐ Prepare Q&A bank that anticipates region-specific questions (government partnerships, market entry barriers, ESG compliance).
- ☐ Complete compliance checks for all local regulations.

Owner/due date/notes:

10. Week 12: Execute and debrief

- ☐ Deliver the event and monitor engagement, adjusting for cultural dynamics as needed.
- ☐ Record sessions and distribute follow-up materials in Arabic and English.
- ☐ Track outcomes such as investor enquiries from regional funds and media sentiment.
- ☐ Capture lessons learned and update playbooks for the next Capital Market Day.

Owner/due date/notes: