CASE STUDY

How ATEC Spine restored confidence in earnings day

Imagine the stress of going into an earnings call. Now imagine walking into one after your tech provider failed you for two quarters in a row.



THE CHALLENGE

For Jessica McGilvary and the investor relations team at ATEC Spine, that feeling had become all too familiar. After years with the same earnings communications provider, changes to the provider's backend platform contributed to significant issues during two consecutive earnings calls. Nothing had changed on ATEC Spine's side, but suddenly a process the team had relied on for years was no longer an option.

The technical problems were frustrating. The harder part was what came with them.

Neither Jessica nor the senior leadership team could simply assume everything would work as expected. She remembers the pressure clearly: "That's six months of fear and wondering, 'How do we get this right?'"

For lean IR teams, there's nowhere for that pressure to hide. ATEC Spine runs its investor relations program in-house, with Jessica working alongside finance and IR leadership. When earnings arrived, the team wanted the focus on telling ATEC Spine's story, not worrying about the mechanics of the call.

Too many times, the tech got in the way of that story and ATEC Spine knew they needed a change. Another platform alone wasn't going to solve the problem. Jessica had to know that the people behind it understood what was at stake.



> "This really is our time to shine and tell our story to the market. It's about so much more than the numbers. It's an opportunity to showcase our clinical evolution, the innovation driving our business, and how we're continuing to advance spine surgery and make a meaningful difference in patient outcomes."
>
> ***— Jessica McGilvary, Executive Business Partner, ATEC Spine***

THE SOLUTION

Earning trust before going live

Jessica noticed a difference in her earliest conversations with Notified. Instead of moving quickly into a product pitch, the team took time to understand what had happened, how ATEC Spine worked and where she needed help.

> “They asked questions about wanting to know our business and where my pain points were and how they could make my life easier. I was thinking, ‘These are my people.’”
>
> ***— Jessica McGilvary, Executive Business Partner, ATEC Spine***

That attention continued during onboarding. Jessica received the expected platform training and tutorials, but the Notified team didn’t assume that one training session would be enough. They continued checking in as she became familiar with the system and asked what else she needed to feel comfortable.

The biggest difference came in the preparation for the first live event.





Before the call, Notified and ATEC Spine conducted three full mock earnings calls, each with a live operator. Notified team members joined as sell-side analysts to simulate Q&A, allowing the team to rehearse the event from beginning to end. The final run-through included ATEC Spine's executive team.

The goal wasn't to teach an experienced team how to run an earnings call. It was to remove the question that had been hanging over them for two quarters: When we go live, can we trust this process?

> "Sure, how many more do you want? How many times can we do this? What do you need to feel comfortable knowing that we're going to get the job done this time?"

The preparation extended behind the scenes as well. Technical teams from Notified and ATEC Spine worked together ahead of the event to make sure the network environment was ready and to address potential problems before call day. By the final rehearsal, Jessica could show the executives in the room that the new process had been thoroughly tested.

> "I was hesitant, let's call it six weeks out. We did three dry runs. And by earnings, I was totally confident."
>
> ***— Jessica McGilvary, Executive Business Partner, ATEC Spine***

THE RESULTS

Getting back to business as usual

Two difficult quarters don’t disappear after a few good rehearsals. But when the executive team arrived, the process they had practiced held up.

One difference was apparent right away: the operator. Notified gave ATEC Spine the ability to select its earnings call operator, a detail that mattered to the company’s CEO. The operator knew the system, understood the plan and gave the executive team clear direction before the event. Jessica said the impression in the room was immediate: “Oh, this operator is dialed in. She knows what she’s doing.”

The rest of the call was uneventful, in the best possible way. ATEC Spine had IT support standing by but didn’t need it. The executives could concentrate on the call rather than the technology supporting it.

The feedback after the event was simple and clear:

> “That was awesome. Keep doing it.”

For Jessica, a successful call also began to put the previous two quarters behind her. Notified was helping establish a consistent process, with clear expectations around when the team would reach out, what information she would receive and what needed to happen as the next earnings date approached.

That consistency matters because the real test isn’t whether one call goes well. It’s whether the next one feels easier to walk into.

“I no longer carry that fear of the unknown. There’s a real sense of comfort in knowing I’m in good hands and trusting the process. I feel much more confident now, and I believe that confidence will only continue to grow with time.”



Making the work after earnings easier, too

The experience with Notified also changed part of ATEC Spine's post-earnings routine.

Basic event metrics had never been particularly useful for the team. Jessica was more interested in what analysts were asking and the themes coming through in Q&A. Notified's Agentic Event Report uses AI to surface those themes and organize the questions discussed during the call.

Previously, getting to those insights meant going back through the transcript and doing the analysis herself. Now Jessica has a starting point available shortly after the call that the team can use to prepare for conference season, recurring investor questions and future earnings conversations.

"Having that reporting already pulled together is such a valuable tool. I can use those insights to help streamline our preparation for the next earnings cycle, without having to go back and analyze the data or identify themes on my own. A lot of that work is already done for me, which is a huge benefit."

For a small IR team, that's useful time back. More importantly, it's time that can be spent preparing for the conversations ahead rather than reconstructing the ones that already happened.

A process the team can trust again

Jessica began the search for a new earnings communications provider because a process she had relied on for years had become something to dread.

What ultimately stood out about Notified wasn't a single feature. It was the willingness of the team to keep working with ATEC Spine until Jessica felt comfortable putting the new process in front of senior leadership.

> "The level of customer service and the showing of partnership was beyond my expectations. It felt authentic and it wasn't salesy. I knew that they were all in to help make the execution the best it could be."
>
> ***— Jessica McGilvary, Executive Business Partner, ATEC Spine***

There will always be plenty for an IR team to think about on earnings day. For ATEC Spine, whether the call itself is going to work no longer needs to be one of those things.