Category

Strategy

Strategy for Shareholder Activism & Defense Playbook

Preparing for and responding to an activist campaign without becoming defensively closed to legitimate critique

- Executive
- Advanced
- Template Included

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- 4 minute(s)

Overview

A framework for preparing a credible response to shareholder activism — knowing your own vulnerabilities, having a response team and communication plan ready, and engaging genuinely with legitimate points even while defending against opportunistic ones.

How is this different from the Board-Level Strategy Oversight &

Activist Preparedness Playbook? That playbook is about proactive board oversight rigor to identify and fix vulnerabilities before an activist arrives. This playbook is about what to do once an activist campaign has actually started — the response process, team, and communication strategy.

Should every activist campaign be treated as adversarial?

Not necessarily — some activist input, even if unwelcome in delivery, is substantively legitimate. This playbook explicitly separates evaluating the substance of an activist's case from managing the adversarial process, so a company doesn't reflexively reject valid critique just because of how it arrived.

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