IR MAGAZINE FORUM – AI FOR IR

Building an AI-powered IR strategy

Friday, December 1, 2023
etc.venues 360 Madison Avenue, New York

AGENDA

This event is in person only. All times are in ET (Eastern Time)

8.00 am   **Registration, refreshments and networking**

9.00 am   **Welcome to the forum**

9.15 am   **Harnessing the power of AI for IR: Opportunities, applications, and implications**

AI is transforming the practice of investor relations. This opening session will set the scene for the day and provide a strategic overview of AI's emerging role within IR. The panel will outline key trends, risks and considerations for IROs and give a bird's eye view of integrating AI as a driver of efficiency, insight and value creation across the investor relations function.

- Defining AI within the context of IR and its unique capabilities for IR workflows
- The case for an AI-powered IR program: Why an AI co-pilot provides a competitive advantage
- High-impact applications: Prioritizing AI for content creation, sentiment analysis and targeting
- Risks and implementation challenges: Data privacy, compliance and change management
- Leveraging AI's potential while proactively managing the risks and ethical concerns
- The future of AI in IR: New capabilities on the horizon and critical trends to watch

9.45 am   **Best practices from the buy-side: Applying AI for deeper analysis and faster decisions**

The buy-side has been using AI to inform their decisions for years and it continues to shape the investment landscape. We look inside the buy-side's AI adoption to discover how investors harness AI and what IR teams can learn from the early adopters. The panel will provide an investor's perspective on:

- How the buy side uses AI to make well-informed investment decisions
- Processing vast amounts of company data, market trends and competitor information
- Translating data into predictive analytics, risk assessment and valuation modelling
- Techniques used, such as NLP, to extract insights from the information put out by IR teams, such as earnings calls, presentations, reports and news
- Mitigating bias and ensuring accuracy in AI-generated information
- Advice on how to best use AI for targeting, communication and engagement

10.15 am   **AI for IR lightning pitch**

Hear from the very best service providers in IR and learn in just 90 seconds what innovations and developments they are making to help harness the power of AI for your company.

10.25 am   **Networking break**

10.55 am   **Best practice: Ethics, compliance and risk management for various AI use cases**

Adopting new technologies like AI demands proactive governance. This session will equip IROs to integrate AI responsibly and minimize regulatory, reputational and data risks. Panelists will outline best practices for transparency, including:

- Actionable strategies to deploy AI as a trusted advisor rather than a 'black box.'
- How to ensure accuracy and prevent bias while protecting confidential data
- Framework to develop a robust AI policy and become stewards of responsible AI adoption
- Embedding accountability at every step of an AI-assisted investor engagement process
- Mitigating risks by ensuring third-party providers are also protected and compliant

11.25 am   **AI for IR lightning pitch**

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11.35 am   **Level up your content with generative AI: Tools and tactics for impactful communications**

This hands-on session will showcase AI's immense potential for streamlining and strengthening investor communications. Discover easy wins and techniques to harness natural language generation and creative AI for highly engaging content, including:

- What resources, budget and skillset do you need to kickstart your AI content creation?
- Delivering consistent messaging: Evaluating content accuracy, privacy and mitigating risks
- An overview of the latest AI writing and design tools tailored for IROs – what's right for you?
- Identifying the workflows and use cases that benefit the most from AI assistance
- Tailoring and optimizing earnings scripts, visual presentations and social posts with AI

12.20 pm   **AI for IR lightning pitch**

Hear from the very best service providers in IR and learn in just 90 seconds what innovations and developments they are making to help harness the power of AI for your company.

12.30 pm   **Lunch**

1.30 pm   **AI as a source of investor insights: Leveraging AI for targeting and sentiment analysis**

This session will explore how IROs can harness AI to proactively gauge investor and analyst sentiment, tailor communications and effectively target the right investors. We will cover:

- Techniques for predictive shareholder analysis and dynamic investor targeting using AI
- Personalizing outreach using AI-generated investor personas and historical preferences
- Monitoring shifting sentiment across earnings, investor and analyst calls to identify risks
- Training AI on historical content to forecast investor reactions and pre-empt concerns
- Strategies vs capabilities: Evaluating analysis accuracy and ensuring unbiased AI systems
- Extracting competitive insights with AI for industry benchmarking
- Tools available for efficient targeting and vetting AI solution providers to find the right fit

2.15 pm   **Hitting the ground running: Actionable first steps to replicate in your IR team**

This session will offer multiple perspectives and examples of how an IR team can practically begin integrating AI into their IR strategy. Discover from experts in the field what steps you could take to immediately to jumpstart your AI journey. We will cover:

- Assessing what options exist for IR teams and what specific tools are available to be utilised
- Assessing your current IR capabilities to identify the areas where AI could add value
- A beginners guide to adopting and implementing new AI strategies and functions

2.45 pm   **Networking break**

3.15 pm   **Mini-workshop and roundtables: Hands-on strategies for adoption and integration**

In this interactive session, attendees will synthesize learnings into an actionable checklist to hit the ground running on deploying AI. Through group collaboration and exercises, IROs will blueprint an AI implementation roadmap that's tailored to their IR program, including:

- Assessing and prioritizing AI opportunities using a "now, near, far" framework
- Workshopping real-world risk scenarios and developing policies for responsible adoption
- Outlining governance best practices for ethical, compliant AI integration
- Identifying the top three AI techniques to enhance targeting, analysis, content generation
- Restructuring team roles, skills, and workflows in an AI future

3.45 pm   **Early adopters Q&A: Ask the vanguard**

With discussion of theoretical AI plentiful but hard examples of incorporation scarce, this session will give you the opportunity to ask anything of speakers who really know what they are talking about. As pioneers of utilising AI in IR, they can provide real life knowledge of the practice, the pitfalls and the potential of an integrated approach. This session will cover:

- Real world case studies and success stories of specific use of AI to assist, streamline and improve IR functions
- Strategic and technical insights from lessons learned and challenges overcome
- Benchmarking of peer engagement and prowess in AI
- Practical consideration of how to replicate AI success in your own team

4.15 pm   **Closing keynote: Next steps, possibilities and the road ahead for AI and IR**

This session will consolidate all the learnings from the day into a prescriptive framework for thoughtfully leveraging AI as a trusted advisor and a new source of delivering shareholder value. We discuss the immense possibilities that an AI-empowered future presents and what the IR world could look like in 10 years, including:

- Reskilling to become fluent in AI-driven IR workflows
- Restructuring teams to collaborate with AI systems effectively
- Embracing new roles emerging from AI adoption
- Actionable next steps for piloting and adopting AI-enabled best practices responsibly
- Longer-term projections on AI's potential to redefine analyses, targeting, and strategy

4.45 pm   **Closing remarks**

5.15 pm   **Drinks reception and networking**

7.00 pm   **End of event**