

IR MAGAZINE FORUM – AI AND TECHNOLOGY

IRO USE CASES - AI DISCOVERY, IMPLEMENTATION AND USAGE

Tuesday, December 3, 2024
Convene 101 Park Avenue, New York



With an increasing number of investors, governance and corporate communications teams adopting innovative technology, machine-learning and generative AI to support their day-to-day decision-making, it is critical for IR teams to follow suit. However, at this blossoming stage, there are a lot of questions around implementation, accuracy, security concerns and many more.

The IR Magazine Forum – AI and Technology is being held in New York on Tuesday, December 3 and through real use cases, will provide IR teams at publicly listed companies with a blueprint for the responsible use of AI and other innovative technology to supercharge their IR program.

AGENDA

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

8.15 am **Registration, refreshments and networking**

8.55 am **Welcome to the forum**

9.00 am **Gain c-suite buy-in: Teach your c-suite to escape the “AI and new technology as an experiment” mentality**

As the wave of AI and innovative tech grows, IROs must stay ahead of the curve to survive. Therefore, although it is essential to experiment with AI and technology it is important not to get stuck in an exploration loop and ensure you fully implement it and optimize its potential. To do so you first have to get the C-Suite on board!

This panel will focus on the strategies and tactics IROs can use to educate the C-suite on the need to embrace AI and technology to ensure their buy-in.

- The proof is in the pudding! Showcase successful AI and technology use cases and their impact on business metrics
- Learn how to build a clear and concise narrative highlighting the value that AI and technology will bring and how this ties in with the company's values, strategy and goals.
- Educate the board on how AI and technology can drive revenue growth, cost reduction, market expansion and customer satisfaction.
- Create a risk mitigation plan that addresses potential challenges and uncertainties the board may have relating to implementing AI and technology
- Fully understand your C-suites perspective on the direction of the company to fully comprehend their concerns.

*Moderator: Steve Wade, head of content, IR Magazine
Bryan Kloster, manager of investor relations, Autonation
Gregg Lampf, vice president of investor relations, Ciena*

9.35 am **Workshop – Reliable methods to efficiently report on ESG matters**

Discover how AI can enhance your ESG reporting and analysis. In this session, you'll leverage AI tools to extract insights, identify opportunities, and benchmark performance against your peers—all aimed at improving your company's sustainability initiatives.

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- Upload your company's latest ESG disclosures.
- Use AI to summarize key findings and pinpoint areas for improvement.
- Generate an audio summary for a quick, digestible overview of the information.
- Compare your company's performance to peers and uncover best practices to elevate your ESG strategy.

Gregg Lampf, vice president of investor relations, Ciena

10.10 am **The ultimate guide to building your AI and technology support team. Who, when and how.**

AI and innovative technology is becoming an essential part of an IROs tool kit, but to use it effectively and safely you need to adhere to certain rules and regulations whilst understanding the complex intricacies of how to optimize your usage. This panel will help you discover the essential steps and strategies for assembling a high performing multidisciplinary AI and technology support team.

- Assess in-house, company culture aligned solutions v outsourced, expensive but rapidly scalable results
- Implementing a team that can navigate regulatory compliance – who will keep up to speed with and report on the ever-changing regulations?
- The head of the chain: Recognize the c-suites role in when to address AI and technology transformation challenges
- Understand the importance of having an AI and technology vanguard on the board – Chief AI Officer/Chief Data Officer.
- Understand how to foster effective cross-department collaboration.

Moderator: Steve Wade, head of content, IR Magazine

Adam Borgatti, senior vice president, corporate development and investor relations, Aecon

Amin Mousavian, vice president investor relations and treasury, TMX Group

10.40 am **Networking break**

11.10 am **Leveraging AI to elevate IR**

Join Darrell Heaps, founder and ceo of Q4, as he explores how artificial intelligence is reshaping investor relations to drive exceptional outcomes. Discover how AI enables smarter decision-making, improves efficiency, and uncovers opportunities through advanced data analysis and trend identification. Get an exclusive first look at Q4's beta AI dashboard on the IR Ops Platform, designed to handle the heavy lifting - providing powerful data analysis and delivering actionable insights so you can focus on achieving high impact IR strategies.

Moderator: Steve Wade, head of content, IR Magazine

Darrell Heaps, founder and chief executive officer, Q4

11.45 am **Overcoming the risks and obstacles of AI and technology implementation**

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Whilst the rapidly evolving AI and technological landscape brings with it a plethora of benefits to IROs, it also conveys a multitude of risks. Fears around privacy, accuracy and accountability have stifled its implementation.

This panel will highlight the biggest risks IROs will face and give you a road map on how to use AI and technology in an ethical, transparent and responsible way.

- Ensure AI systems are compliant with data protection regulations
- Strategies on being transparent with investors: suppressing concerns, whilst still fostering trust
- Invest in regular security audits, incident response planning and promoting a security-first culture.
- Learn how to identify and counter AI powered cyberattacks
- Plan to reskill or upskill affected employees and introduce metrics to measure success

Moderator: Tim Human, event editor, IR Magazine

Chandrika Nigam, former senior director of investor relations, Adtalem Global Education

Gianni Martinelli, investor relations, Globant

12.15 pm **Workshop – AI-powered targeting: How AI can enhance identifying and engaging with new investors**

In this session, you will use AI tools to identify potential new investors based on a wider data-set, and prioritize those investors who are most likely to invest in your company and move the needle on your valuation

- Think like an institutional investor when benchmarking yourself vs peers
- Make your messaging more dynamic by identifying real-time data that investors care about
- Use AI to adapt your targeting strategy accordingly

Peter Wright, founder and chief executive officer, Intro-act

1.00 pm **Lunch**

1.50 pm **Keeping up with the buy side: The challenges and possibilities for IROs**

As the buy-side continue to embrace AI and machine learning systems to improve efficiencies and optimise their investment strategies it is paramount that IROs can keep pace with this movement.

Presenters will take a deep dive into how investors are using AI and technology, and the impact this has on an IROs role.

- Review what IROs need to do to adapt to AI and technology-driven capital markets
- Identify the specific needs of the buy-side – what information is key, how are they obtaining this data and where from?
- Learn what factors drive investors to invest in or divest from your stock
- Bridge the data gap from sell side analysts to the buy side.
- Level the playing field: Embrace similar tools to fully understand investor preferences, identify peer companies, and explain stock price movements effectively

Moderator: Steve Wade, head of content, IR Magazine

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Jason Fooks, managing director, investor relations, Brookfield Asset Management
Andrew Posen, vice president, head of investor relations, WOW! Internet, Cable and Phone
Chris Tillett, senior director, investor relations, Fortive
Jared Wasserman, associate vice president, corporate platforms, Nasdaq

2.20 pm **Workshop - Using AI and technology to tailor earnings call communications for investor analysis**

In this session, you will use AI and innovative technology to tailor your core message across different digital platforms and to different audiences quickly and effectively.

- Understand how AI quantitatively measures language and how to optimize language for these scores.
- Identify areas of disconnect between human comprehension and NLP scoring of language.
- Test the impact of word and phrase choice on the scoring of an earnings call.

Chris Blake, executive director of product innovation within issuer solutions, S&P Global Market Intelligence

2.55 pm **Networking break**

3.25 pm **Fireside chat: Creating a multi-year road map for the successful adoption of AI and technology**

AI and innovative technology is more accessible than ever before, but their successful implementation needs a methodical and practical approach. For success, you need a long-term strategy that results in a steady acquisition of knowledge, technical skills and processes with a goal to improve the efficiency of IRO job functions.

This panel will provide you with a guide to accelerate your progress towards the adoption of AI and technology

- Actionable insights into where to start your due diligence, determining the best fit for you and your company.
- Assess the cost v efficiency, do the results outweigh the time and investment
- Evaluate and prioritize the necessity for different AI solutions, now, in the near future and further down the line, and understand how this need will change overtime
- Build internal expertise whilst fostering a culture of experimentation.
- Consider the importance of proper on boarding for new employees.
- When to include the board in the decision-making process

Moderator: Steve Wade, head of content, IR Magazine
Megan Larson, senior advisor, investor relations, Murphy Oil Corporation

3.45 pm **Workshop – AI powered research tactics: Competitive intelligence and analysis**

In this session you will use AI and innovative technology to -

- Summarize an Analyst Note for Management
- Write a Weekly CI Email for Management
- Prepare for a Conference Q&A Session
- Analyze a Slide of Data to generate speaking notes

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Bryan Kloster, manager of investor relations, Autonation

4.30 pm **Navigating the future AI and innovative technology landscape: Trends, Predictions and Opportunities**

Here we will examine current trends in the generative AI space and take a journey through the future possibilities that AI and technology hold for IROs

- Discuss what is needed for AI to move from being a buzzword to a critical driver of technological advancement
- Consider if future AI capabilities could rival human reasoning
- Learn if one tech could fit all and if so what will this look like.
- Assess if AI will communicate with AI allowing IROs to become more creative

Moderator: Tim Human, event editor, IR Magazine

Peter McGough, senior vice president, investor relations & capital markets, Gambling.com Group

4.55 pm **Summary and closing remarks**

5.00 pm **End of event and drinks reception**