

# IR MAGAZINE FORUM – AI FOR IR

Thursday, March 7, 2024  
Leonardo Royal Hotel London City, London

## AGENDA

All times are in GMT

8.30 am **Registration, breakfast and morning networking**

8.55 am **Welcome to IR Magazine Forum – AI for IR**

Laurie Havelock, editor-at-large, IR Magazine

9.00 am **Getting started with AI: Overview, policies and use-cases**

One of the main barriers cited to AI adoption is not knowing where to start. To kick things off our panelists will share specific use-cases of AI within IR and provide practical advice on how to build an AI-powered IR strategy.

- Get the basics right: Defining AI in the IR context
- AI case studies: Discover key applications of AI currently in use by IR teams
- Looking ahead: Discuss where AI could add the most value to IR as technologies evolve

Moderator: Laurie Havelock, editor-at-large, IR Magazine

Erik Carlson, CFO & COO, Notified

Nick Stone, head of investor relations, GSK

9.45 am **Close the AI skills gap: Ensuring your IR team is AI-ready**

In this panel we'll analyze how AI is influencing the skills and responsibilities of IR, share specific tactics to make the most of AI tools, and discuss what you can do to ensure you and your team are informed and up-to-date on how to integrate AI into existing workflows.

- Hear an overview of the main AI skills gaps and common misunderstandings for IROs
- Develop strategies and solutions to improve AI literacy & upskill yourself and your team
- Understand evolving IR skills needs in an AI-driven world
- Learn how to seamlessly integrate AI tools into existing IR workflows and processes
- Make the most of AI tools: Responsible use, prompt engineering and the role of a trusted 'AI whisperer'

Moderator: Noemi Distefano, reporter, IR Magazine

Ross Hawley, head of investor relations, Redde Northgate

David Irish, investor relations & ESG senior manager, Vodafone

Irina Logutenkova, head of investor relations, Getech

10.30 am **Networking break**

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## 11.00 am **AI and shareholder engagement: Leveraging AI to improve communications**

In this panel we'll be focussing on the specific ways AI can support your shareholder communication strategy, the value (and risks) of using different AI tools to generate IR content, and explore how to responsibly use AI to ensure more impactful shareholder interactions.

- First steps: Identify low-risk applications of AI to drive efficiency in shareholder communications
- Using AI to improve your shareholder ID
- Discover use-cases of AI in shareholder communications: Social media posts, drafting releases, and other applications
- Discuss the limitations, data privacy and security risks around using AI to generate materials
- The future of shareholder engagement: How to use AI to craft more engaging content

Moderator: Laurence Taylor, Senior conference producer, IR Magazine  
Greg Secord, vice president, investor relations, OpenText

## 11.30 am **AI and targeting: Identifying and approaching compatible investors**

Alongside streamlining your communications with existing shareholders, AI offers enormous potential for IR teams looking to access new investors and grow their shareholder base. Here our speakers will talk through how AI can support your search for compatible investors, facilitate with outreach and ensure your messaging is accurate and tailored to its audience. We will also discuss the specific applications and pitfalls of using AI to target retail investors.

- Learn which AI tools IR teams are using to locate compatible investors
- Discover how best to use AI to analyze market trends and gain insight into investor behaviour
- Address the accuracy, transparency and confidentiality concerns associated with AI targeting
- Discuss how AI can fine-tune your outreach to a range of investors

Moderator: Tim Human, senior reporter, IR Magazine  
Christian Bacherl, founder, ACCNITE  
Gabriel Gonzalez-Gutierrez, investor relations & ESG manager, Rolls-Royce  
Jennifer Ramsey, senior investor relations manager, Imperial Brands

## 12.20 pm **AI for IR lightning pitch**

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Hear directly from a variety of service providers on how their tools and technologies can benefit your IR function. See innovative product demonstrations, take part in interactive polls and Q&As, and get up to speed on the rapidly evolving AI for IR vendor landscape.

12.30 pm **Lunch**

1.30 pm **AI and the buy-side: Adapt your disclosure for AI-driven capital markets**

The buy-side has been using AI for years to inform their investment decisions, from algorithmic trading to sentiment & market analysis. In this panel we'll examine how the adoption of new AI tools and technologies is reshaping the investment landscape, and what this means for IR teams looking to ensure their company story is communicated effectively.

- Learn how investors are using AI tools and using AI to inform their investment decisions
- Discuss the implications of an AI-driven capital markets ecosystem on investor relations
- Get ahead of the trend and ensure your investor communications are AI-friendly

Moderator: Laurie Havelock, editor-at-large, IR Magazine  
Harry Jack, head of pan european equity research, Schroders  
Stefanie Mollin, global equities portfolio manager, GIB Asset Management

2.15 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.

3.00 pm **Building an AI-powered ESG toolbox**

This year, large companies already subject to the NFRD *must* comply with the CSRD, significantly increasing the scope and depth of sustainability reporting. In this panel, we'll discuss how AI can support IR teams in their sustainability reporting journey, adapt to new disclosure requirements and deliver effective ESG communications to all stakeholders.

- Understand the role AI can play in helping to understand and comply with the CSRD
- Automate emissions gathering, sentiment analysis and benchmarking processes
- Leverage AI for sustainability reports and effective year-round ESG communications

Moderator: Laurence Taylor, senior conference producer, IR Magazine  
Alex Annaev, independent expert

3.30 pm **Champagne roundtables: Learn from your peers in interactive group discussions**

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- Balancing AI with human expertise
- Staying compliant with evolving AI regulations
- Managing conflicting stakeholder pressures around AI
- Measuring success: Metrics and KPIs

4.15 pm

**Closing remarks and networking drinks**