

IR Magazine Forum – North America 2021

Post-pandemic action plans
The growing strategic importance of IR

Thursday, October 7 2021
Virtual event

ABOUT

Bringing together IR professionals from across the US and Canada, the IR Magazine Forum – North America is designed to facilitate idea-sharing and best practice discussion on **how the IR function will operate over the coming months**.

Hear perspectives from issuers and investors on **IR marketing and engagement trends**, the growing **significance of environmental and social issues**, the evolving **strategic importance of IR**, and more.

AGENDA

All times are in ET (Eastern time zone)

10.30 am **Platform opens: Meet the attendees**

10.55 am **Welcome to the IR Magazine Forum – North America 2021**

Opening remarks from the chair

Laurie Havelock, editor-at-large, [IR Magazine](#)

11.00 am **Spotlight on North America: Outlook for stocks and latest buy-side trends**

To keep your finger on the pulse of investor sentiment and capital markets trends as the economy recovers now is a good time to assess the latest happenings in capital markets. In this session, you can:

- Hear a breakdown of the latest developments regarding inflation and economic recovery across North America
- Hear how the buy-side is viewing US and Canadian stocks and what the prospects are according to investment managers
- Understand the mega-trends to be aware of going into 2022.

Laurie Havelock, editor-at-large, [IR Magazine](#)

Chris Varvares, vice president and co-head, US economics, [IHS Markit](#)

Chris Williamson, chief economist, [IHS Markit](#)

11.30 am IR engagement, marketing and corporate access: How can IR remain agile?

As IR engagement calendars gradually return to a more long-term model, before year-end is a good time to assess what the future looks like. What percentage of engagement will be expected to take place in person, what are investors looking for from future issuer engagement, and how is the sell-side planning the calendar for 2022? In this session, you can:

- Compare company strategies for future hybrid, in-person and virtual interactions over the next few months
- Hear best practices for ensuring maximum engagement with potential shareholders during periods of continued uncertainty
- Discuss whether the new blended approach for engagements will fundamentally change how IR and senior leaders interact with key stakeholders.

Laurie Havelock, editor-at-large, [IR Magazine](#)

Mark Chyc-Cies, vice president, strategy, planning and IR, [Gibson Energy](#)

Rob Garrigan, head of corporate services, [OpenExchange](#)

Debbie Hancock, senior vice president of IR, [Hasbro](#)

12.15 pm [Meet the attendees: Networking](#)

Take some time to meet other attendees via a quick, one-to-one video chat. You have five minutes to introduce yourself and share contact details before you're on to meeting the next person!

12.30 pm Evolving the discussion on ESG: Reporting consolidation and practical steps

The recent SASB and International Integrated Reporting Council merger contributes to more consolidation on reporting frameworks. Coupled with the rise in investor focus on social and diversity issues and concerns over SEC mandatory reporting, the spotlight on ESG is increasingly visible. This session will move the discussion forward on ESG and give attendees practical insights into operating in the current climate. Attendees can:

- Discuss the latest developments in the reporting space: what are issuers using to disclose, and what does the recent merger mean for standardization?
- Learn what stakeholders are currently pushing for and hear expectations on the ideal depth and frequency of investor ESG communication
- Discover what your primary focus should be as an IRO when it comes to ESG, especially if you're in the process of taking the initial step to establish a framework.

Tim Human, senior reporter, [IR Magazine](#)

Milla Craig, founder and president, [Millani](#)

Aaron Howald, director of IR, [LP Building Solutions](#)

Tanya Levy-Odom, director, investment stewardship, [BlackRock](#)

George Trisic, chief governance officer, [Algonquin Power & Utilities](#)

1.30 pm

The great transformation: From investor days to investor experiences

2020 fundamentally changed the way IR presented their companies to investors. Teams had to adapt quickly to a new way of engaging and responding to the challenges of virtual events. While concerns remain around the effectiveness of virtual investor days, the industry has evolved significantly. To help companies create impactful investor days, this session will give IROs creative insights into:

- How to reinforce customer-centricity during virtual investor days
- How to clearly define and monitor your success story
- The best ways of shaping a strategic narrative for investors and analysts.

Steve Wade, head of event content, [IR Magazine](#)

Pete Deutschman, chief buddy and chief innovation officer, [The Buddy Group and Michaels](#)

Sam Levenson, founder and CEO, [Arbor Advisory Group](#)

2.00 pm

Case study: Lessons learned from running a large-scale virtual investor day

As remote events may become a critical function of the IR role, in this session, we will delve into the merits and challenges of running large-scale investor or analyst days and hear from companies that have experienced one. We will discuss:

- What needs to be considered when planning a hybrid or entirely virtual investor or analyst day, from operations and budgeting to travel hesitancy
- How to build relationships and maximize virtual engagement while preparing for several potential pitfalls
- How to measure success to ensure your strategy is working effectively.

Laurie Havelock, editor-at-large, [IR Magazine](#)

Dave Hughes, vice president of IR, [Imperial Oil](#)

Chip Newcom, director of IR and sustainability, [Equinix](#)

Mark Wilson, executive creative director, [Cramer](#)

2.45 pm

Polishing your shareholder ID and targeting strategy

Considering sell-side changes and increased direct interaction with stakeholders, this session will look at the best ways to improve the effectiveness of your targeting process and find investors that are the right fit for your company. We will discuss the latest routes, tools and tactics to increase visibility and get noticed by the investment community. Attendees can:

- Hear how, in a more virtual world, IR can balance targeting new investors with maintaining existing relationships with shareholders. Has the presence of virtual increased fund flows over the last year?
- Understand what the rise of buy-side corporate access and the evolving sell-side mean for IR targeting strategies and how to respond
- Discuss when to involve senior management in investor meetings and ensure management's time is being spent effectively across the board.

Ben Ashwell, editor, [Corporate Secretary and IR Magazine](#)
Katie Durant, senior director of IR, [CVS Health](#)
Balaji Krishnamurthy, head of IR, [Uber](#)
Jason Tsai, vice president of IR, [Zendesk](#)

3.30 pm **Meet the attendees: Networking**

Take some time to meet other attendees via a quick, one-to-one video chat. You have five minutes to introduce yourself and share contact details before you're on to meeting the next person!

3.45 pm **STREAM ONE: Embracing digital strategies to improve shareholder engagement**

With people spending more time online and increased use of social media as a substitute for daily news, information gathering and trading, the potential marketing benefits of embracing digital strategies are enormous. This session will discuss ideas on best practice shareholder communication strategies, where IR fits into social media marketing and monitoring, and how IR can take inspiration from the companies leading the way with new tech and digital methods.

Tim Human, senior reporter, [IR Magazine](#)
Richard Babineau, director of issuer solutions, [Mediant](#)
Kelly Earle, vice president of communications, [Skeena Resources](#)

STREAM TWO: Global trends in corporate governance – Prioritizing environmental and social issues

Corporations globally are experiencing more attention to their oversight of climate change risk, human capital management, diversity and equity, and response to activism. In this session, you will hear updates from North America and beyond, proxy season findings and how IR and corporate governance can best work with the board to meet expectations.

Ben Ashwell, editor, [Corporate Secretary and IR Magazine](#)
Anthony Garcia, director of responsible investing, [Nuveen](#)
Elena Rosman, vice president of IR, [Aptiv](#)

4.15 pm **How to move forward in your career: The evolving strategic importance of IR**

Investor relations has traditionally acted as the critical link between a company and the outside world. As capital markets evolve, however, so does the role of IR and what is expected of investor relations teams. In this session, heads of IR and senior managers will discuss how the IR function is fundamentally changing and how to keep up. You can learn:

- What the three-year strategy is for IR teams across North America
- What trends are emerging regarding the career prospects for IR professionals
- What CEOs/CFOs will be expecting from IR in the future.

Laurie Havelock, editor-at-large, *IR Magazine*

Matt Gugino, vice president of IR and financial, planning and analysis, *Danaher*

Jill Slattery, senior vice president, head of IR and corporate development, *Hilton*

Mike Smith, vice-chair and chief financial officer, *Voya*

5.00 pm

Closing remarks and end of the forum

Ben Ashwell, editor, *Corporate Secretary and IR Magazine*