



IR MAGAZINE THINK TANK WEST COAST

Thursday, September 19, 2024
San Francisco, CA

PRIORITIZE, CREATE AND OPTIMIZE

As the constantly changing geopolitical landscape continues to affect capital markets, it is vital for companies and IR professionals to enhance their **communication efforts**, better **evaluate IR's impact** and ROI, and **adapt to evolving expectations**, regulations and investor needs.

The agenda looks at top-of-mind issues for IR professionals, and our unique think tank format prioritizes actionable advice, networking, and collaboration in a confidential environment. This closed-door event is by invitation only for senior IR professionals at listed companies to plan strategically for the year ahead.

AGENDA

All times are in Pacific Time (PT)

- 8.00 am **Registration, breakfast and morning networking**
- 8.45 am **Welcome to the IR Magazine Think Tank – West Coast 2024**
- 9.00 am **Controlling the narrative in times of low valuations**

With so many factors affecting the rise and fall of a company's value, it is essential for IROs to understand the factors that govern these movements. In this panel we will focus on the methods IROs can use in a low valuation environment, specifically looking at how to control your company narrative and which communication channels to use when engaging current and potential investors.

- Learn how to align your equity story with those investors that fit your company in today's market
- Discover how to successfully communicate your position in a risk-off market
- Debate how to act if the buy side narrative is wrong – understand the most effective communication channels to use to challenge this narrative
- Changing your communication strategy to optimize your company's value when others in your market have had bad earnings
- Discuss how to differentiate yourself from a sector that is out of favor with investors.

Moderator: Steven Wade, head of content, IR Magazine

Aron Feingold, vice president of investor relations and corporate communications, Geron Corporation

Jason McGruder, head of investor relations, Newmark

Peter Schuman, former vice president of investor relations, industry analyst and public relations, Cambium Networks



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9.30 am

Aligning communications with the milestones in an IR professionals' calendar

IR professionals have many milestones to work towards throughout their calendar year. Milestones such as quarterly earnings, proxy season, the annual meeting, annual reports and at each point the information they need, people they address and channels they use to communicate will change. In this panel we will assess how IROs can ensure they are prioritizing enough time to each milestone, differentiating their communications accordingly and using the most relevant channels to optimize their outreach.

- How to position yourself as the thought leader and strategic catalyst behind your company's communications
- Learn how to tie major investor communications to both your company and product news
- What are the various recurring cycles on the calendar and how can IROs streamline their communications
- Debate how to differentiate the message based on the IR activity
- Understand how to foster effective cross-department collaboration at these points in the year

Moderator: Steven Wade, head of content, IR Magazine

Alexandra Chan, senior director investor relations, Salesforce

Linda Pazin, head of strategic communications, Sempra

Emily Tadano, vice president of investor relations and ESG, Meritage Homes

10.00 am

Roundtables – Best practice for optimizing data collation, time management and corporate messaging

In this session we will learn how to win with effective messaging and define a roadmap in which you can manage your time efficiently to collect the correct amount of relevant data, ensuring a results driven narrative.

10.30 am

Networking break

11.00 am

AI – The creation of a strategic multi-year plan. The now, near and far view

With the rapid increase in the amount of proprietary information and data acquired by investment firms, knowledge sharing and accessibility is of paramount importance to Investor Relations professionals. However, AI tools on the market continue to create challenges with their limitations, security issues and lack of reliability. In this panel we take a deep dive into best practices for navigating the publicity surrounding Ai to get c-suite buy in and look at how IRO's can produce a comprehensive plan detailing the challenges and solutions of incorporating Ai into their IR programme, now, in the near future and further down the line.



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- The now: Learn effective ways to manage AI scepticism, showcase ROI and obtain C-Suite buy in
- The new: Understand which AI tools are readily available to IROs and hear how IR teams are utilizing them to enhance IR efforts
- The far: Understand the impact of increased AI usage by investors and potential for issuers, and hear future best practice for optimizing value and minimizing risk

Moderator: Steven Wade, head of content, IR Magazine

Valmik Desai, director of investor relations, Salesforce

Jami Taylor, senior vice president and head of investor relations, Coherus Biosciences

11.30 am **Roundtables AI – What is out there and how are people using it?**

We take a deep dive into what technology is available to IROs now, what will be available in the future and how it is being used to alleviate some of the heavy lifting

12.00 pm **Best practice for efficient and successful targeting**

Efficient targeting is an essential part of all successful IR programmes and crucial to driving strategic value. With many internal and external factors to consider, evaluate and understand; prioritising time, data sets and which channels to use is critical in cultivating relationships with compatible investors.

This panel will provide actionable insights and assist in creating a marketing strategy that can help with investor conversions and increased sell-side coverage.

- Discuss how to successfully evaluate your existing targeting activities and optimize them: Understand what can be improved and how to improve your targeting efforts?
- Recognize how to prioritize which investor events and meetings to attend and how to effectively allocate the most appropriate person to the correct investor
- Learn how you can enhance the accuracy, timing and overall impact of your investor outreach
- Best practice investor screening and profiling – delving deep to unearth an investors financial situation, investment experience, requirements and risk-tolerance

Moderator: Steven Wade, head of content, IR Magazine

Rich Barry, head of C.S. corporate solutions, Citadel Securities

Chip Newcom, head of investor relations, Equinix

Harshit Vaish, senior vice president and head of strategy, corporate development and investor relations, Expedia Group



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12.30 pm **Roundtables – is there an ultimate guide to targeting?**

Here we will evaluate the various ways companies are targeting current and new investors. From increasing trading volume, refining investor targeting lists to increasing responses from cold outreaches.

12.45 pm **Lunch**

1.45 pm **How to deal with a shareholder activist campaign**

With the continual expansion of the global investor base and a growth of laws and regulations encouraging shareholders to exercise their rights there has been a noticeable surge of shareholder activism over the past decade.

As shareholder activism becomes more prominent, this panel aims to help IROs navigate and manage the process effectively, preparing for the challenges in 2025 and beyond.

- Learn what an activist campaign can look like and how to communicate with all investors during this time
- Understand how to work with external counsel and advisors effectively when an activist is at the door
- Discuss effective methods for winning support among your shareholders
- Hear how to manage and brief the board during an activist campaign.

Moderator: Steven Wade, head of content, IR Magazine

Ted McHugh, managing director, head of strategic situations and investor relations, Edelman Smithfield

Peter Michelsen, head of activism and shareholder advisory, Qatalyst Partners

Derek Zaba, partner and co-chair for shareholder activism and corporate defense, Sidley Austin

2.15 pm **Roundtables – best practices for when an activist comes knocking**

Openly discuss the red flags to look out for prior to activist engagement and assess how to prevent, mitigate, adapt and become resilient to future activism.

2.45 pm **Measuring the success of your investor engagement program**

The success of an IRO is measured not just in financial terms but also in the effectiveness of communication and engagement with stakeholders. IROs play a pivotal role in shaping how an investor perceives a company and are crucial for optimizing strategies and achieving sustainable growth. In this panel, we will explore the essential Key Performance Indicators (KPI's) that IR professionals should track to measure the success and impact of their efforts.

- Performance KPI's vs action based KPI's: Which are more effective and how to balance reporting



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- How to make the most out of your investor perception study
- Learn what management most value in an IRO and an IR program and which KPIs showcase that most effectively

Moderator: Steven Wade, head of content, IR Magazine

Johnny Lai, senior vice president of corporate development and investor relations, Axos Financial

Martin Viecha, former vice president of investor relations, Tesla

3.15 pm **Break**

3.45 pm **Stories from the trenches**

In a Chatham House Rules setting, leading IROs will share their biggest challenges during their careers in investor relations. Identifying when things have and could have gone wrong. Describing the journey they took through the crisis and finally highlighting the lessons they learnt, helping them become a better and more experienced IRO professional.

We finish the discussion by turning to the audience for Q and A and to share any of their relevant stories.

Moderator: Steven Wade, head of content, IR Magazine

Chris Evenden, former executive vice president investor relations and corporate development, Ryff

Peter Schuman, former vice president of investor relations, industry analyst and public relations, Cambium Networks

Martin Viecha, former vice president of investor relations, Tesla

4.05 pm **The IR situation room**

A carefully structured, collaborative session that gives attendees an opportunity to work together to solve each other's real-life IR challenges in a consultation-style setting

- Get real solutions from IR peers on a particular challenge you are facing
- Understand the challenges that other IR professionals are facing
- Benefit from the collective discussions that result.

Moderator: Victoria Hyde-Dunn, vice president of investor relations, Informatica

4.50 pm **Summary of discussions and end of the conference**

5.00 pm **Happy hour drinks reception**