

IR Magazine Think Tank – West Coast II

Monday, September 16, 2019
Garden Court Hotel, Palo Alto, CA

8.15 am Breakfast and registration

9.00 am Welcome and opening remarks

Ben Ashwell, editor, IR Magazine

9.15am IR trend watch: Responding to changes on the sell side

- Reduced coverage – Are you experiencing it? What can you do to counter poor quality research? How do you determine the value/accuracy of your covering analysts and how does that factor into who you partner with? What has this done to the accuracy of financial modelling and consensus?
- Company sponsored research – Have you used it? What's your perception of it? When would you use it?
- Direct engagement – Have you had experience of setting up investor meetings directly? How does it dovetail with the work you do through brokers? How did you find out how the investor organized corporate access?

Grant Bartucci, associate director, corporate access & broker relations, Point 72

Victoria Hyde-Dunn, head of investor relations, 8x8

Mary Frances Turnbull, managing director, corporate access, Raymond James & Associates

9.45 am Developing a robust engagement strategy: Targeting and roadshow best practice

- How have engagement trends evolved internationally since the implementation of Mifid II? What is the best way to get in front of investors at this time?
- How best to discover GARP and long-only investors? What are the risks in targeting long-only funds and sovereign wealth funds from outside of the US?
- What factors go into determining the IR calendar? How should you manage your IR calendar between conferences, industry events and analyst days?
- What is the level of importance you assign to each? Has it changed in recent years? Are IR teams favoring NDRs over conferences, because they can get in front the people they want to meet?
- How much value do you put into non-deal roadshows? In what regions, how often and under what circumstances do you do IR-only roadshows?

Joon Huh, vice president of investor relations, Zuora

Lauren Dillard, chief communications officer and head of investor relations, LiveRamp

Shannon Tatz, vice president of strategy and IR, PROS

10.30 am Table discussions investor engagement best practices

Participate in structured group discussions focused around the issues mentioned in the previous targeting session and also on broader investor engagement best practices including earnings calls, social media, IR only roadshows and marketing calendars. Share your experiences and solve problems as a group in an interactive environment.

11.00am Refreshment break

11.30am Buy-side panel: Investor's perspective on ESG integration

- Is there a specific area of ESG that has gained more focus in the past year?
- To what extent do 'S' & 'E' influence buy/sell decisions?
- What questions do ESG-focused investors ask in meetings?
- What should smaller companies with limited resources focus on?
- What are the top disclosures that are most important to investors?
- What are some of the most common misconceptions with respect to the reporting process?

Robbie Miles, ESG analyst, Allianz Global Investors

Nashat Moin, senior ESG analyst, Wells Fargo Asset Management

Greg Waters, analyst, technology and communications sector, SASB (Moderator)

11.55am IRO panel: How does the increasing focus on ESG impact the IR function?

- How should you be integrating sustainability into your overall strategy and reporting processes? What is considered best practice?
- What's the best way to manage external expectations for additional disclosure metrics on the business?
- Should you pursue outbound programs to discuss ESG with passive investors?
- Are there regional or cultural differences between US and European investor views on ESG?

[Beth Howe, vice president and head of IR, HP](#)

[Katrina Rymill, vice president of investor relations and sustainability, Equinix](#)

[Rob Zivnuska, managing director, PJT Camberview](#)

[Greg Waters, analyst, technology and communications sector, SASB \(Moderator\)](#)

12.20 pm Table discussions on ESG integration best practice

12.45 pm Lunch and networking

1.45 pm IR at the table: How to elevate IR to become a strategic partner within a company

- What is the future of IR? How do you see IR evolving in 5-10 years and what will drive this change?
- What does the c-suite want from their IR teams? Does less active management mean smaller role for IR?
- What are some best practices for getting your CEO and CFO on the same page during tough times?
- How do you measure the success of your IR program?
- How can IR teams best use their resources so that the IRO can be focused on providing strategic value?
- To what extent does this rely on partnering with colleagues in other departments and how can you build those relationships?

[Ian Koenig, senior vice president, strategic growth, Investis Digital](#)

[Maggie O'Donnell, director of investor relations, Wix.com](#)

[Gabrielle Rabinovitch, head of investor relations, Paypal](#)

[Smooch Repovich Reynolds, MD partner, global IRO & CCO practice group, ZRG Partners](#)

2.45 pm NEW FORMAT: Open Q&A with investors and analysts

- What do investors value most from IR teams? Key questions coming from investors and analysts
- Thinking like a PM: How to approach different portfolio managers
- Understand the investment style for different funds and how you can become more relevant

[Lori Keith, portfolio manager, Parnassus Investments](#)

[David Lopez, portfolio manager, Grassi Investment Management](#)

[Justin Patterson, senior research analyst - internet, digital media, and travel, Raymond James Financial](#)

3.45 pm Final thoughts

4.00 pm Networking drinks