



# IR MAGAZINE THINK TANK WEST COAST

Wednesday, March 22, 2023  
El Prado Hotel, Palo Alto, CA

## ENGAGE – MEASURE – ADAPT

Equities are facing an uncertain landscape in 2023. It is vital for companies and IR professionals to enhance their **communication efforts**, better **evaluate IR's impact** and ROI, and **adapt to constantly changing 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 2023**

9.00 am **Opening Keynote: Navigating a volatile economic landscape**

To set the scene for the day, we discuss the external factors contributing to market volatility and explore how IR teams need to change in a market where equities are out-of-favor.

- Market outlook: hear how forecasts for inflation, interest rates, supply chains and geopolitical risk impact investor decision-making
- Debate how the role of IR changes in a market dislocation
- Investor engagement: discuss how best to communicate effectively in a challenging market
- Horizon scanning: how to best prepare yourself for market-wide risk in 2023

Moderator: Lauren McDonald, conference producer, *IR Magazine & Corporate Secretary*

Rebecca Corbin, founder and CEO, *Corbin*

Uma Moriarity, senior investment strategist and global ESG lead, *CenterSquare Investment Management*

9.30 am **Build your investor base in 2023**

As companies plan their marketing calendars, this panel will help you understand how IROs can identify and engage new investor targets during a market downturn and improve your capital-raising efforts.

- Learn innovative ways to target and engage new investors in a risk-off market
- Hear how companies are using stock surveillance to enhance their targeting efforts in today's market



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- Maximize c-suite time: Discuss how best to utilize leadership through investor-facing activities
- Discover which metrics matter most: Analyze the most important factors to assess investor suitability and make the most out of your tools

Moderator: Steve Wade, head of event content, *IR Magazine & Corporate Secretary*  
Mark Fasken, co-founder and COO, *Irwin*

10.00 am **Roundtables on building investor base and IR's role in the current macro environment**

10.30 am **Networking break**

11.00 am **Not another ESG session: Practical ways to control your ESG narrative**

In a break from typical ESG discussions, this session will utilize case studies to highlight practical ways companies are enhancing their ESG measurement and disclosures.

- Learn how companies are staying ahead of the curve with their ESG disclosure efforts
- Hear how companies select the metrics that are most material and how companies are using data to tell their story most effectively
- Understand what companies are doing to better target their ESG investors

Moderator: Lauren McDonald, conference producer, *IR Magazine & Corporate Secretary*  
Mary Ellen Fukuhara, investor relations director, *Zillow*  
Joanne Medero, independent director, *Nuveen Funds*

11.30 am **Ensuring a peaceful AGM: Shareholder activism and engaging all stakeholders**

This panel will look at how to navigate increasing involvement from investors around social and political issues while providing insight into how IROs can keep the expanding sphere of stakeholders in their consideration. It will cover the following:

- Discuss why improving governance is becoming an important part of the IR role
- Understand new stakeholder priorities: Learn how to consider the roles of ESG analysts, proxy firms, different shareholders, as well as your c-suite as it relates to your annual meeting
- Proactive engagement: how IROs can engage shareholders on governance issues
- Share best practices about how IROs can best prepare for an AGM

Moderator: Steve Wade, head of event content, *IR Magazine & Corporate Secretary*  
Steve Austenfeld, VP of investor relations, *The Honest Company*

12.00 pm **Roundtables on Governance and ESG practicalities**



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12.30 pm

## **CASE STUDY: Practical applications of AI in investor relations**

The launch of ChatGPT has led to IR Officers exploring the use of artificial intelligence in their roles, asking how it can improve efficiency and free up time to focus on more strategic tasks.

Much of these discussions can be theoretical, but we have found a company that has been using AI as part of their earnings call process to help maximize management's time and broaden the reach of their quarterly results.

- Hear a real-world case study about how Veritone are using AI as part of their shareholder communications
- Understand the limitations and benefits of AI as it relates to your work
- Get ideas about how you can enhance productivity in your role, and maximize reach in your financial communications.

Moderator: Steve Wade, head of event content, *IR Magazine & Corporate Secretary*  
Ryan Steelberg, CEO and president, *Veritone*

12.45 pm

## **Lunch**

1.45 pm

## **DEBATE: How to handle unfavorable analysts**

Take part in this debate and answer the question, "Should IROs try to turn analysts around or focus their time on analysts that understand their story?" During this session, we also consider how IROs engage with analysts who assess their stock negatively. This exciting panel with a new format will discuss the following:

- Whether IROs should attempt to change the mind of analysts who give their stock a 'sell' rating, or if their time is better spent with optimistic analysts?
- Learn how IROs engage analysts who do not support your company's vision
- Share ways to communicate with analysts if your sector is out of favor

Moderator: Steve Wade, head of event content, *IR Magazine & Corporate Secretary*  
RJ Pellegrino, head of TMT corporate access, *Cowen*  
Samuel Wilson, interim CEO, *8x8*

2.15 pm

## **How to prepare an effective earnings call**

This panel examines examples of best practices when it comes to reducing risk and maximizing impact during earnings calls. Enhancing your skills in this critical part of the IR role:

- Preparation: hear time-saving tips and maximize your efficiency in advance of the call



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- Examine how the market looks at Non-GAAP metrics
- Understand which stories to prioritize: how to utilize sales data and team ideas
- Learn how to make an impact in the media following your quarterly results

Moderator: Steve Wade, head of event content, *IR Magazine & Corporate Secretary*  
Erik Carlson, COO and CFO, *Notified*  
Maria Riley, vice president of investor relations, *CrowdStrike*  
Jill Sawyer, head of investor relations, *Prologis*

2.45 pm **Roundtables on communicating and managing relationships with analysts**

3.15 pm **Break**

3.45 pm **Investor Q&A: Have all your questions answered by the buy side!**

Our ever-popular investor Q&A session is back. Leading portfolio managers will answer any question to help you understand how investors think and what they want from companies in the current environment.

- Hear about the top concerns investors have in the current market
- Learn about what portfolio managers need IRs and senior management to do better
- Understand how best to approach the buy side in today's environment

Moderator: Steve Wade, head of event content, *IR Magazine & Corporate Secretary*  
Lori Keith, director of research and portfolio manager, *Parnassus Investments*  
Roger Mortimer, portfolio manager, *KraneShares Advisors LLC*  
Elliott Wilson, portfolio manager, *Woodline Partners LP*

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

4.30 pm **Happy hour drinks reception**