



# IR THINK TANK WEST COAST

Thursday, March 20, 2025  
San Francisco, CA

## IR IN A YEAR OF CHANGE

As Donald Trump returns to the White House, IR professionals are set for a year of change, with **regulation, capital markets and corporate reporting** all set for a shake up.

To understand the impact on your IR activities and how to plan ahead, join us on March 20 in San Francisco for our think tank, which is **exclusively for senior, in-house IR practitioners**.

The agenda looks at top-of-mind issues for IR professionals, and our **unique format** prioritizes actionable advice, networking and collaboration in a confidential environment.

## AGENDA

All times are in Pacific Time (PT)

8.00 am **Registration, breakfast and networking**

8.45 am **Welcome to the IR Think Tank – West Coast 2025**

Tim Human, events editor, IR Impact

9.00 am **Managing your message amid macro uncertainty**

Economic and political uncertainty are high as markets try to piece together how and when the new US administration will implement its campaign promises on tariffs, deregulation and other areas. At this time, telling your story and maintaining the confidence of investors is harder than ever. In this opening session, we unpick the macro picture to hear which policy changes will have the most impact and offer advice on crafting a story that takes into account different outcomes.

- Get expert analysis on the prospects for tariffs and deregulation
- Understand how investors view the US policy agenda
- Hear case studies of how to communicate through trade uncertainty

9.30 am **Investor targeting: New techniques to enhance results**

While stock markets have rallied strongly in recent years, many companies still struggle to attract attention from new investors. And now, with US policy plans creating uncertainty, the search for your next shareholder is even tougher. In this session, we explore innovative ways for companies to boost their appeal and hear case studies from successful targeting programs.

- Hear which targeting tactics lead to the best results
- Get advice on new locations to add to your roadshow schedule
- Identify investors that are open to your sector and market cap



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10.00 am **Roundtables – Communicating and attracting investors in the current environment**

Discuss with other senior IROs at your table the ways you are positioning your company and seeking out investors against a backdrop of shifting macro issues.

10.30 am **Networking break**

11.00 am **AI for IR: Real-world use cases to enhance your IR program**

Where is AI technology really adding value for IR teams? In this session, we hear from IR professionals that are successfully incorporating AI tools into their earnings process, competitive intelligence gathering and other areas of IR practice. They explain which tools they are using, how to get started and the prompts they rely on. The session will also explore the use of automation to free up time for higher-value activities.

- Quickly get started with AI and bag easy wins
- Learn about different tools and where they add most value
- Gain C-suite buy in and overcome security concerns

11.30 am **Roundtables – Learn from your peers about the most effective AI applications for IR**

Share ideas with peers about the best way to get started with AI technology for IR activities and how to overcome any obstacles to implementation.

12.00 pm **Is ESG dead? How to talk about sustainability in 2025**

The backlash against ESG and sustainability, with a special focus on diversity and inclusion programs, has left many companies wondering how to include environmental and social issues in their equity story. In addition, many find themselves caught between different stakeholders, as US and European investors diverge in their areas of focus. In this session, hear companies explain how they are approaching ESG in the current environment.

- Learn different strategies for managing the debate around ESG
- Respond successfully to criticism focused on diversity programs
- Effectively manage diverse stakeholder views

12.30 pm **Roundtables – Share strategies on incorporating ESG issues into your overall message**

In this roundtable session, discuss with other IROs what ESG information you are planning to release this year and how you are positioning it as part of your equity story.

12.45 pm **Lunch**



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1.45 pm **From IR to CFO: How former IROs made the switch**

A common aspiration of IR professionals is one day to become a chief financial officer, but what does it actually take to make the jump? In this session, we hear from former IROs who have become CFOs at public and private companies, breaking down their career paths, what obstacles they faced and how others can follow in their footsteps.

- Detailed case studies of IROs who moved to CFO posts
- Learn what makes an IRO an attractive C-suite candidate
- Hear CFOs explain what they value most from IR teams

2.15 pm **Best practices for working with the sell side**

The sell side is a critical partner for companies as they communicate and engage with existing and prospective investors. But how can you ensure you are getting the most value from your sell-side relationships? In this session, experienced IROs and members of the sell side offer advice on managing your pool of followers, maximizing management time across different events, working with new analysts and much more.

- Hear advice on balancing time and attention across your analyst following
- Maximize the value from investor conferences and non-deal roadshows
- Effective strategies for attracting new sell-side coverage

2.45 pm **Roundtables – Share careers advice and tips for sell-side engagement**

At your tables, choose whether to discuss strategies for career advancement or tips for building and managing your sell-side following.

3.15 pm **Networking break**

3.30 pm **Ask-me-anything session with the buy side**

Our ever-popular buy-side Q&A session is back. Put your most pressing questions to our panel of investors – learn how they are positioning themselves for Donald Trump's second term, whether they still care about ESG, the best way to secure a meeting and much more.

- Candid Q&A session with local investors
- Get advice on arranging meetings and providing management access
- Learn red flags that put investors off your story



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4.00 pm

## **IR solutions 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 dealing with
- Benefit from the collective discussions that result

Moderator: Victoria Hyde-Dunn, vice president of IR, Informatica

4.45 pm

## **Summary of discussions and end of conference**

Tim Human, events editor, IR Impact

5.00 pm

## **Happy hour drinks reception**