

# IR IMPACT FORUM – AI AND TECHNOLOGY

Empowering IROs with thought leading AI and tech insights

Wednesday, November 12, 2025, New York

## AGENDA

This event is in person only. All times are in Eastern Standard Time (EST)

**8.15 am**      **Registration, refreshments and networking**

**8.55 am**      **Welcome to the forum**

*Steve Wade, head of content, IR Impact*

**9.00 am**      **Navigating the AI frontier: A comprehensive update on industry developments**

As AI continues to evolve at an unrelenting pace, IROs must constantly educate themselves on how the industry is changing and understand the effects that failing to stay ahead of the curve will have on their role. Remaining informed is no longer optional, it's a strategic necessity.

In this panel, leading IROs will explore the most impactful AI advancements, the platforms and tools gaining greatest traction and the emerging trends that are redefining the IROs function.

- Examine the AI and technological needs of today's IROs and assess whether recent shifts in the vendor landscape are effectively meeting those demands
- Discover the latest advancements in AI and technology and explore how they can enhance targeting strategies, refine earnings call preparations and strengthen competitive positioning
- Discuss if there is a "one stop shop" and examine how different platforms and tools are being successfully used in unison for a variety of IR functions
- Consider the crucial role AI is now playing in managing and reporting sustainability metrics, ensuring compliance with new regulations like the evolving SEC disclosure requirements
- Gather strategic insights into what the next steps in the AI and Tech evolution will be.

*Moderator: Steve Wade, head of content, IR Impact*

*Deborah Belevan, vice president of investor relations, Duolingo*

*Steve Winoker, chief investor relations officer and senior vice president, Paypal*

**9.30 am**      **Workshop - Strategic reasoning with AI: Leveraging Next-Gen LLMs in Investor Relations**

As large language models evolve beyond content generation into advanced reasoning and decision support, Investor Relations professionals have a powerful new toolkit at their fingertips.

This workshop explores how to harness the capabilities of reasoning LLMs, like GPT-4o, Gemini 1.5, and Claude 3, for strategic analysis, investor engagement and communication planning. Learn how to go beyond prompts and use AI as a thinking partner in your IR strategy.

*Gregg Lampf, vice president of investor relations, Ciena*

**10.05 am**      **An effective roadmap for AI adoption and use: How to efficiently collaborate with your legal, IT and dedicated AI departments**

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As AI technologies rapidly evolve, organizations face increasing pressure to integrate intelligent systems responsibly and efficiently. However, successful AI adoption is not just a technical challenge, it requires seamless collaboration across departments, particularly Legal and IT.

This panel will explore the strategies and tactics IROs can use to ensure successful AI adoption, implementation and usage, that balances innovation with compliance, security, and operational integrity.

- Understand the specific challenges your legal and IT teams face when evaluating the implementation of AI and emerging technologies
- Learn how to foresee and address IT risks and regulatory concerns
- Best practices for engaging legal teams early to navigate regulatory and ethical considerations
- Strategies for partnering with IT to ensure scalable, secure and unbiased AI systems
- Identify the internal infrastructure and workforce required for the effective adoption
- Assess the importance of cross-departmental AI committees to ensure alignment of AI adoption strategies with compliance and technical feasibility
- Insights into overcoming a lack of resources in money, people and infrastructure to enhance company wide acceptance.

*Moderator: Steve Wade, head of content, IR Impact*

*Carolynne Borders, chief investor relations officer, GE Healthcare*

**10.35 am      Networking break**

**11.05 am      Workshop - AI-powered targeting: How AI can enhance outreach and engaging with new investors**

In today's competitive capital markets, finding and engaging the right investors is more critical and complex than ever before.

This hands-on workshop will give you tactical insights into how to leverage AI to identify potential investors, personalize outreach and optimize engagement strategies. Learn how to move beyond static targeting lists and embrace dynamic, data-driven investor discovery.

**11.40 am      Measuring the unmeasurable and immeasurable. Demonstrating the value of AI investment**

Many IROs struggle to justify AI investments, expecting to demonstrate clear, measurable benefits, when AI remains a complex and often misunderstood technology among key stakeholders.

This session brings clarity by providing a roadmap for measuring the ROI of AI. Enabling IROs to quantify the success of AI, track its tangible impact and measure the results effectively proving that the effort, money and time invested in AI are worthwhile.

- Discuss what ROI actually looks like and consider the challenges around defining it.
- Understand how to showcase successful AI and technology use cases and their impact on business metrics
- Debate the relevance of "hard" and "soft" benefits and examine which are most important to you, cost and time saving v employee satisfaction and retention
- Learn how your peers are monetizing the use of AI

*Moderator: Steve Wade, head of content, IR Impact*

*Bryan Kloster, investor relations manager, Automation*

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## **12.15 pm Case Study. Smart, safe and strategic: Leveraging AI in a secure way.**

This interactive session explores how IR teams can leverage AI capabilities to enhance performance, deepen investor engagement and stay compliant.

## **12.50 pm Lunch**

## **1.50 pm How will Agentic AI change IR workflows and what are the associated risks and opportunities**

Investor Relations Officers are beginning to explore Agentic AI to enhance efficiency and engagement in financial communications. Unlike traditional AI, Agentic AI can autonomously analyze data, generate insights, and even interact with stakeholders without the need for constant human intervention.

This session will explore the evolution of Agentic AI, strategizing ways to enhance its opportunities while addressing the associated risks and challenges.

- Gain insights into how your peers are utilizing agentic AI to enhance risk assessment, engage stakeholders, automate reporting and collect market intelligence
- Create a strategy for developing and scaling agentic AI ecosystems that are efficient, well-governed and future-proof
- Recognize the new risks that agentic AI poses to data security, trust and transparency and identify the steps necessary to mitigate these risks
- Consider the regulatory uncertainties surrounding agentic AI implementation and usage along with strategies to ensure compliance
- Discuss the efficiency gains associated with agentic AI and evaluate methods for quantifying operational cost reductions.

*Moderator: Steve Wade, head of content, IR Impact*

*Marci Ryvicker, executive vice president of investor relations, Comcast*

## **2.25 pm Workshop – From earnings call to investor action: How AI drives smarter follow-up**

The next frontier in Investor Relations is here! Transform how you manage post-earnings follow-up with AI agents that can think, act, and collaborate autonomously.

Your earnings call concluded recently. Now, maximize its impact. Using Q, the industry's first IRO Agent™, you'll transform earnings insights into strategic investor engagement through hands-on experience with AI Agents.

Turn your post-earnings period from reactive scramble into strategic advantage with autonomous AI systems that deliver personalized engagement at scale.

- Analyze your IR landscape and plan your post-earnings week with AI
- Master investor sentiment analysis and institutional engagement prioritization
- Create personalized outreach based on call questions and stakeholder priorities
- Build monitoring dashboards to track engagement effectiveness
- Integrate Q with your existing data to streamline activity planning

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*Darrell Heaps, founder and ceo, Q4*

## **3.00 pm      Turning conversations into action: Conquering the fear of embracing AI and innovative technology**

The integration of AI and innovative technology into IR workflows is inevitable, yet many IROs face resistance due to regulatory concerns, security risks, and operational disruptions.

In this session we will explore how IR teams can embrace AI confidently, address fears from internal stakeholders and leverage AI for data-driven investor engagement.

- Assess how clear communication, continual training and early stakeholder alignment can streamline AI acceptance
- Consider what guard rails you can implement to ensure data privacy and protection against cyber threats and data breaches
- Explore the ethical frameworks for integrating AI, while prioritising human impact and addressing employee concerns relating to AI-driven job displacement (you won't lose your job to AI, but you may lose your job to someone who is using AI)

*Moderator: Steve Wade, head of content, IR Impact*

*Lori Chaitman, global head of investor relations, Kyndryl*

*Heather Livingston, manager, investor relations, ONEOK*

*Ronen Tamir, vice president investor relations, Pfizer*

## **3.30 pm      Networking break**

## **4.00 pm      Workshop – The new buy-side persona, AI language processing: Understanding how investors are measuring language and how to optimize your communications.**

Buy-side investors have long utilized technology to measure and analyze the language being used by public companies. In today's environment, AI is further accelerating this approach for both the complexity of analysis and the proliferation across investment community. In this workshop, understand how many investors are using this technology and how you can adjust your language to account for it. Get hands on experience with tools that can analyze your language, both in secure private settings as well as more complex analysis of public documents.

*Chris Blake, executive director of product innovation within issuer solutions, S&P Global Market Intelligence*

## **4.30 pm      How are the buy-side harnessing AI to optimize decision making and why does generative engine optimization matter**

As buy-side firms rapidly adopt AI to enhance investment analysis, decision-making and portfolio management, it is essential for IR professionals to evolve in parallel.

This panel offers a behind-the-scenes look at how investors are using AI and how IR teams can leverage similar tools to anticipate investor behavior, tailor engagement and sharpen their strategic communications.

- Discuss how you can adapt your IR strategy and messaging to AI-driven capital markets
- Tactical guidance for optimizing web communications for generative AI discovery, a deep dive into the emergence of generative engine optimization
- Debate whether AI-driven algorithmic trading is emerging as the driving force behind buy-side strategies and how to overcome the associated challenges

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- Strategic insights into how AI is being used for predictive analytics, sentiment analysis and alternative data integration
- Consider the role of machine learning in portfolio optimization and trade execution
- Discover effective strategies to enhance investor access to IR information through streamlined self-service formats
- Learn how to integrate AI into your IR website efficiently

*Moderator: Steve Wade, head of content, IR Impact*

*David Grunfeld, founder and ceo, AIIRO*

**5.00 pm**      **Demo – Prompt engineering for Claude**

*Michelle Montemarano, strategic planning and investor relations, GE HealthCare*

**5.15 pm**      **Closing remarks and drinks reception**

**5.50 pm**      **End of drinks reception**