

# Digitalization Into the Future

## The NIRI Chicago Investor Relations Workshop

September 22, 2023

**8:00 a.m. - 8:45 a.m. Registration, Breakfast and Exhibitor Showcase (Oak Room)**

**8:45 a.m. - 9:30 a.m. AI: Friend, Foe or Coworker? (Oak Room)**

Artificial intelligence (AI) has arrived in the mainstream workplace. How should we think about this transformative technology? This session will discuss AI's impact, including how AI and tools, such as ChatGPT, can become part of everyday work life, as well as the IR and career ramifications.

**Speaker: Drew Elhers**, Global Futurist and Director of Portfolio Management, Enterprise Software, Zebra Technologies

**Moderator: Jeff Myers**, Midwest Regional Head, NYSE

**9:30 a.m. - 9:45 a.m. Break / Exhibitor Showcase (Oak Room)**

Meet with key service providers to learn about the latest trends and tools that can help you do your job better and more easily.

**9:45 a.m. - 10:45 a.m. Flirting with Disaster: Managing Social Media Risks in Crises (Oak Room)**

This interactive session – essentially, a tabletop exercise – enables participants to discuss how to respond to an escalating crisis. The scenario: a large tech company progresses from cuts in employee perks and benefits to layoffs; social media prompts negative articles in mainstream media and top-tier financial publications; critics target the CEO's high compensation, operational and leadership performance; investors panic and the stock price plummets.

**Moderators:**

**Ira Gorsky**, Executive Vice President, Edelman Smithfield

**Shama Hussain**, Senior Vice President, Edelman Smithfield

**10:45 a.m. - 11:15 a.m. Break / Exhibitor Showcase (Oak Room)**

Network with your IR colleagues and meet with key service providers to learn about the latest trends and tools that can help you do your job better and more easily.

**11:15 a.m. - 12:00 p.m. A Guide to Getting the Buy-Side's Attention (Oak Room)**

Searching for the perfect investor? Getting ghosted by a prospective shareholder? Attracting new shareholders can be one of the most challenging aspects of investor relations. Obstacles to attracting buy-side attention include the increasing number of names that each analyst follows and proliferation in communication channels – phone, email, Zoom, conferences, non-deal roadshows, etc. Experienced buy-side professionals will advise us on which tactics work best to get their attention.

**Panelists:**

**Erika Maschmeyer, CFA**, Lead Portfolio Manager and Director of Research (U.S.), Columbia Wanger Asset Management

**Maneesh Singhal**, Vice President, Senior Analyst, CastleArk Management

**James Wong**, Head of Specialist and Corporate Access Origination, Millennium Management

**Moderator: Sandi Meeks**, Vice President, Rivel, Inc.

- 12:15 p.m. - 1:10 p.m. Lunch Session: Persuasive Data Visualization (Oak Room)**  
 Your value in an organization is driven by your ability to persuasively present ideas and solutions that are driven by analyses of data and evidence. In this interactive workshop, you will learn how to clearly communicate your company's investment appeals across presentation slides and handouts to audiences of varied context and expertise. We will review and implement research-backed guidelines – drawn from cognitive science, data visualization, graphic design and data journalism – for effectively uploading your argument to the brains of your audience in engaging, clear and memorable ways.
- Speaker: Steven L. Franconeri**, Professor of Psychology, Northwestern University's Kellogg School of Management
- 1:15 p.m. - 2:15 p.m. Keynote: From TV to Futures – Fireside Chat with Steve Grasso**  
**Speaker: Steve Grasso, Chief Executive Officer, Grasso Global Inc.**  
 Steve Grasso is a regular contributor to CNBC's Fast Money financial talk show and a former NYSE floor official and governor. Based on more than 30 years of trading experience, he will provide insights on policy, regulation and the future of the stock market during this fireside chat.
- Moderator: Ruth Venning, IRC**, Executive Director, Investor Relations and ESG at Horizon Therapeutics and 2023 NIRI Fellow
- 2:15 p.m. - 2:45 p.m. Break / Exhibitor Showcase (Oak Room)**  
 Network with your IR colleagues and meet with key service providers to learn about the latest trends and tools that can help you do your job better and more easily.
- Also, this is your last opportunity to complete your prize drawing card to win.
- 2:45 p.m. - 3:30 p.m. ESG 2.0 – From Defense to Offense (Oak Room)**  
 ESG investing considers a company's impact on the environment, society and corporate governance when making investment decisions. ESG has growing importance as a differentiator to drive stock decisions and increasing influence on Millennial (born 1981 and 1996), Generation Z investors (born 1997-2012) and beyond. As a result, some publicly traded companies have decided to prioritize ESG factors – not just to manage risk but to play offense. Our panelists will share ESG strategies being deployed to attract long-term investors, create corporate value and contribute to positive change in the world.
- Panelists:**  
**Tim Hill**, Head of Stakeholder Engagement, OMRON Global  
**Jonathan Hirschtritt**, Managing Director, Sustainability, GCM Grosvenor  
**Michael Wanta**, Manager, ESG and Corporate Communications, Telephone & Data Systems Inc.
- Moderator: John Coons**, Retired JPMorgan Chase Executive, Midwest Global Corporate Banking
- 3:30 p.m. - 5:00 p.m. Networking Reception and Prize Drawing (Lincoln Room)**  
 End the day with a beverage, appetizers and conversation with your fellow workshop participants. Plus, you could win some great prizes. (Must be present to win.)