

DEFY CONVENTION/SHATTER EXPECTATIONS/SHAPE THE FUTURE
BREAKING THE MOLD

BY AL RICKARD, CAE

NIRI
ANNUAL CONFERENCE
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2017

2017 is evolving as a year where “breaking the mold” seems to be the norm. This is true for many sectors of society from politics to journalism to industry and beyond.

It’s certainly true in the financial and investment world where IROs face an uncertain path in the regulatory arena and a host of other developing issues and trends that span many years.

Discussions aimed at providing solutions to the real challenges that IROs face can be found at the 2017 NIRI Conference, the largest gathering of IR professionals in the world, on June 4-7, 2017 at the JW Marriott Grande Lakes in Orlando, Florida. The theme is “Breaking the Mold: Defy Convention/ Shatter Expectations/Shape the Future.”

“As investor relations professionals, we must adapt to the rapidly changing landscape of the profession,” declares 2017 NIRI Conference Co-Chair Dennis Walsh, senior manager, investor relations at Zillow Group. “We’re faced with strict regulations, a 24-hour news cycle, increasingly engaged investors, and many more challenges that pop up almost daily. In addition, the IR community itself is evolving given the varied professional backgrounds of those serving in IR positions.”



Dennis Walsh

Conference Co-Chair Karen Fisher, senior vice president at FSW Communications, offers this solution: “Break the mold. We must hear compelling viewpoints from new stakeholders in an environment where we



Karen Fisher

can discuss corporate and industry challenges with our peers and develop strategies to deal with change. That’s what the NIRI Conference is committed to do this year.

“You can expect to see more than 125 expert speakers in innovative session formats, including smaller group sessions that take a deeper dive into niche topics, such as changes to market structure or debt IR, as well as case studies on topics such as how to respond to the current environment of shareholder activism. And we listened to past conference attendees. Many of the ideas for this year’s conference are based on this feedback.”

NIRI President and CEO Gary LaBranche, FASAE, CAE, is ready to meet as many NIRI members as possible. He will kick off the conference at Monday’s first general session and will meet with attendees in small groups throughout the conference.

“I look forward to learning more about how NIRI can better serve our members,” he says. “I also appreciate the work of NIRI chapters and especially want to meet their leaders and members.”

If you haven’t already registered for the 2017 Annual Conference, please plan to do so by **May 15**, which is the deadline for standard registration rates. Discounted room rates are available until May 15. For more information and to register, visit www.niri.org/conference.

The Big Picture

Several high-level general sessions will tackle some of the big issues facing IROs and deliver some powerful advice for career advancement:

- **Disruption in the Market: Leaders That Are Changing Business Forever.** Led by moderator Brad Stone, Bloomberg journalist and

author of a recent book, *The Upstarts: How Uber, Airbnb, and the Killer Companies of the New Silicon Valley Are Changing the World*, this session will feature an engaging discussion with Brad Katsuyama, CEO of IEX, and Gillian Munson, CFO of XO Group, on the leadership and culture of companies that are “disruptors” in their industry. Monday morning, June 5.

- **Powerful Tweets: How Corporations Are Preparing to Beat a Social Media Crisis.**

Delivering messages effectively in today’s economic and political environment is challenging. Richard S. Levick, chairman and CEO of Levick, will uncover how IR professionals are evaluating risk and



Richard Levick

preparing for crisis in this era of the 24-hour news cycle and direct communications via social media. Monday morning, June 5.

- **Power Broker: The Latest View from Wall Street, Main Street, and Pennsylvania Avenue.**

Anthony Scaramucci, founder of SkyBridge Capital, will share insights on what to expect in the capital markets, political arena and global environment. Monday afternoon, June 5.

- **Life is Not a Stress Rehearsal: Using Humor**



The IR Showcase is a popular gathering place for networking and talking with industry service providers.

SUNDAY: "GO TO MEETING" DAY!

Sunday, June 4, will be a big day at the 2017 NIRI Conference. So be sure to arrive early!

For starters, at noon, the "New to NIRI Conference Orientation Session," designed for first-time attendees, will provide a complete look at the four-day event and help them get the most out of the conference.

Sunday afternoon kicks off with a dynamic new two-hour "IRO Teach-In" focused on IR strategy, planning, implementation and measurement from 1:00-3:00 p.m. Led by Deb Wasser, executive vice president and U.S. lead of Edelman's investor relations practice, and her team, this session will focus on formulating and executing IR plans through insights from "fireside chats" with four senior IROs who will review their situations, how they planned their strategies for success, what worked and lessons learned.

"Feedback from recent NIRI member surveys indicate that IROs want to gain insights into the key domains in the practice of IR," Wasser explains. "In looking at our Body of Knowledge, the most sought-after topics are IR strategy and planning, brand and reputation management, and effective reporting and measurement. This session is all about harnessing the knowledge and experience of other IROs to create a dynamic and engaging session. We will cover a broad range of IR-related topics including launching a new brand, surviving and thriving after activism, measuring your IR program, building an IR program for a company moving into a new phase of life, M&A IR, and much more."

Later in the afternoon, there will be two additional compelling sessions with industry leading expert panels. These include the popular Global IR Summit, which will feature a discussion on the "Materiality of Nonfinancial Information: Aligning Disclosure Practices with Investor Expectations", and a session focused on broadening influence within your organization in the panel on "Best Practices for Competitive Intelligence."

On Sunday evening, the IR Showcase Grand Opening and Welcome Reception is held from 5:00-7:00 p.m.



Every year the NIRI Conference offers excellent opportunities to make friends.

& Wisdom for Success. Loretta LaRoche, acclaimed speaker, author and international stress expert and humor consultant, will demonstrate how to use humor to reframe stressful situations and capture a new perspective on the difficult parts of life. Monday evening, June 5.

■ **Influence Your World: The Proven Path to Gain Gravitas in a Demanding World.**

Connie Dieken, trusted executive coach and advisor to many influential executives who run the world's most trusted brands, will pinpoint how and why you gain and lose influence.



Connie Dieken

In this interactive session, she will guide you to build an influential message that you can deliver to the most challenging person in your world. Tuesday morning, June 6.

■ **The Evolution of Regulatory and Sustainability Disclosures: What are the Latest Trends?**

Elisse Walter, former Securities and Exchange Commission chairman and commissioner, and current board member of the Sustainability Accounting Standards Board, will discuss how investors are using ESG information and how companies can provide disclosures that better suit investor needs and meet regulatory guidelines. Tuesday afternoon, June 6.

■ **Managing for the Long Term in a Short-Term World.** This session features Sarah Williamson, CEO of FCLT Global, an organization dedicated



to encouraging long-termism in business and investment decision-making; Karessa Cain, a partner with Wachtell Lipton; and Chris Stent, founder of Mission Street Capital Advisors, discussing the competing mandates faced by IROs and their companies — the need to plan for the long term versus the demands by investors for short-term results. Tuesday afternoon, June 6.

- **Global Economic Outlook: Assessing the Impact of Recent Geopolitical Changes.** Jay Bryson, managing director and global economist for Wells Fargo, and Don Rissmiller, founding partner of Strategas Research Partners, highlight recent geopolitical developments and provide perspectives on what future events may cause market fluctuations in the business environment, both in the U.S. and abroad. Wednesday morning, June 7.
- **Good Corporate Governance: Is it Just Common Sense?** A discussion about the Common-sense Corporate Governance Principles, which were endorsed by a group of 13 CEOs and heads of major institutional investment firms in 2016. Panelists include Glenn Booraem, principal and fund controller at Vanguard Group, and Molly Carpenter, corporate secretary at JP Morgan Chase. Wednesday morning, June 7.
- **Reinvention When Faced with Adversity.** Dan Nevins, a retired U.S. Army staff sergeant who was severely injured during combat in Iraq, shares his powerful story of perseverance and reinvention, which has inspired his peers to create positive change for themselves and those around them. Wednesday morning, June 7.

BREAKING THE MOLD SESSIONS

How is NIRI “Breaking the Mold” at the 2017 NIRI Conference? In several ways, including the following new innovative features you won’t want to miss:

NIRI Insight Studio

NIRI is teaming up with IR Magazine and Nasdaq to feature brief interviews with notable conference speakers and other VIPs in a news studio setting in the IR Showcase. This will be a great opportunity to meet keynote speakers and hear more insight from them.

Ask the Experts

During breakfast on Tuesday, June 6, participants will have the opportunity to meet with NIRI Fellows and Senior Roundtable members in small, informal groups, with time for Q&A on a wide range of issues. Discuss your most pressing challenges and career development questions. Tuesday morning breakfast

New Interactive Technology

Many conference sessions will encourage audience participation and feedback through an innovative technology platform that enables crowd-sourced questions and participant live polling.

Tracking Success

The concurrent breakout sessions will cover the latest trends facing IR, finance, communications and corporate governance professionals today. Check out the NIRI 2017 Annual Conference website for the most up to date session listings, descriptions and featured speakers.

Education tracks include “Marketing & Communications,” “Corporate Governance & Regulatory,” “Economics & Markets,” “Career Development” and “Innovations in IR.”

Some of the sessions will cover these highly relevant topics:

- The Proxy: Why IROs Need to Take a Greater Role
- Big Data: How Investors Are Using It to Up the Investing Game



The NIRI Conference offers learning opportunities in a variety of session formats.

- Are We Managing the Street or is The Street Managing Us?
- Establishing Your IRO Leadership Brand
- The Activist Front: What's New?
- The Evolution of Investing: Has the World Gone Passive?
- Be the Board's Valued Partner
- Digital IR Communications: Innovation and Best Practices

Customize Your Learning

The 2017 NIRI Conference is big enough and diverse enough so you can customize your experience according to your needs and interests. Concurrent sessions in five separate tracks offer something for everyone.

On Monday, attendees will have a chance to network with sector peers at an Industry Meet-up Breakfast. There will be a "Small Cap IR Summit" on Tuesday morning to discuss the unique challenges of IROs from micro-cap and small-cap companies. Attendees will have opportunities to hone their skills and improve their career prospects by attending sessions such as "IRMatch.com: Advancing Your Career" and "The Tech Savvy IRO."

There also will be various recreational activities, including a NIRI Golf Classic on Sunday, a yoga session on Monday, and a Fun Run on Tuesday. The JW Marriott Grande Lakes provide shuttle service to Orlando's theme parks, and attendees can book discounted rooms (subject to availability) for three days before and after the conference.

Networking events held in the IR Showcase on Sunday, Monday, and Tuesday will provide the perfect opportunities to visit more than 45 exhibiting companies that provide products and services to support IR professionals in their role. Meeting and interacting with your peers is just one of the great bonuses when participating in the IR Showcase.

So bring your best questions, challenges, and ideas and let's solve them together. [IR](#)

AL RICKARD, CAE, is president of Association Vision, the company that produces *IR Update* for NIRI.

WEDNESDAY: FOUR REASONS TO STAY!

What do corporate governance principles, geopolitical trends, reinvention, and the new NIRI CEO have in common?

Answer: They are all featured on Wednesday, June 7, at the 2017 NIRI Conference! The jam-packed schedule includes an opportunity to meet new NIRI President and CEO Gary LaBranche, FASAE, CAE and time to learn more about NIRI's certification program.

The morning general sessions will dive into the Commonsense Corporate Governance Principles, review the impact of recent geopolitical changes, and hear an Iraq war veteran's powerful story of perseverance and reinvention when faced with adversity.



Gary LaBranche