

NIRI Boston Event Weekly

Register Now for Upcoming Events!



June 2018

NIRI Boston 2017-2018 Season Finale

Date: Tuesday, June 19th

Time: 5:30 - 8:00 PM

Location: The Country Club
191 Clyde Street
Chestnut Hill, MA 02467

Come and enjoy an evening with your NIRI Boston colleagues in celebration of another good programming year. This year's season finale will take place at The Country Club, located in Brookline. The oldest country club in the United States, it holds an important place in golf history, as it is one of the five charter clubs that founded the United States Golf Association, and has hosted numerous USGA tournaments.



Members are encouraged to bring a guest at no cost (please select "NIRI Boston member" fee type when adding a guest on the registration page).

Please note The Country Club requires a jacket and tie for men.

Attendees will be entered to win two premium seats at an upcoming Red Sox game, sponsored by the Proxy Advisory Group. Must be present to win.

[REGISTER HERE](#)

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NIRI Boston Hall of Fame

NIRI Boston is proud to recognize its professionals who have earned their way into the [Chapter's Hall of Fame](#).

To make a nomination for the chapter's 2018 inductee, simply send an email to info@niriboston.org that includes the nominee's name and a brief biography/rationale by June 1, 2018. The 2018 Hall of Fame inductee will be announced at NIRI Boston's year end event in June.

New to NIRI Boston?

Are you a new IR practitioner or a practitioner who is new to the Boston area? Try out one of our monthly meetings. The first one is on us! Use promo code NEWBOSTON when registering.

May 2018 Summary

**NIRI Boston
Platinum Sponsor**



L to R: Josh Brodsky, Susan Hardy, David Calusdian, and Dave Egan

Tips and Tricks to Planning Your Next Analyst Day

Analyst days are meetings hosted by public companies to share details on corporate performance, hone in on key programs, disclose upcoming and important milestones, and provide a level of accessibility to stakeholders and the financial community. The orchestration of such an event takes a meticulous eye toward details, thoughtful scenario planning, and sharing a captivating story that illustrates market need and a promising solution.

To delve further into these topics, NIRI Boston hosted an "All About Analyst Days" event on Monday, May 21. The panel included: Susan Hardy, Corporate Vice President of Investor Relations at Charles River Laboratories; Dave Egan, Senior Research Analyst at Columbia Threadneedle Investments; David Calusdian, President at Sharon Merrill Associates; and was moderated by Josh Brodsky, Director of Investor Relations and Corporate Communications at Alnylam Pharmaceuticals.

Key highlights that came out of this discussion included: (1) objectives for hosting an analyst day; (2) importance of being transparent and accessible; (3) importance of strong preparation; and (4) metrics of success.

Understanding the objectives for hosting an analyst day is critical to the content and structure of this event as it sets the stage for authorized company speakers, key opinion leaders, and level of disclosure and information being shared. One approach that can help structure the agenda for an analyst day is to conduct a perception audit approximately three to six months in advance to gauge what interests or misperceptions exist. Not all companies are afforded the luxury of doing that as executives and IR teams are usually focused on the business, in which case sitting down to have planning meetings to create cohesion on message is an alternative.

Providing transparency and accessibility to stakeholders and the financial community enables a company to build rapport through face-to-face interactions in an informal dialogue. Often having a discussion can alleviate the mystery behind investments and holds the company accountable with near-term milestones. Relationships are key to creating credibility, and without credibility, companies leave room for assumptions to be made.

Preparation is key when it comes to planning an analyst day as there are various moving parts to consider, such as event location, catering, audio/visual needs, target outreach lists, travel and lodging logistics, key opinion leaders, creative collateral, and presentation structure. Time and project management are critical to ensuring things are moving along as they end up defining the metrics of success. Being able to deliver concise messages that communicate progress to the Street is imperative, but sometimes things don't go as planned. One of the panelists shared that last minute jitters and peer news are factors that



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Recent NIRI Boston Meeting Recaps

Unable to attend a recent event?
Event recaps can be found by
clicking the links below.

[April 2018: Valuing and
Measuring IR Engagement](#)

[March 2018: When Your Inside
Information Gets Outside](#)

[January 2018: Changes in
Investor Engagement, Are You
Ready?](#)

[October 2017: MiFID II: How
New Regulations Will Change
Engagement With Your
Investors Globally](#)

[May 2017: Buyside
Perspectives on IR and the
Future of Active Management](#)

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could shake up an otherwise prepared executive. To mitigate this, IROs should prepare all speakers in advance with the core messages so that they are consistently delivered throughout the presentation while also aligning on subtle commands that can nudge an executive to get back on track or to wrap up.

Lastly, in order to gauge the level of success, a number of quantitative and qualitative markers can be considered, such as analyst reports, absorption of messages, feedback from attendees, headcount, stock price, and sentiment among management team. These measurements allow an IRO to benchmark strategic improvements that could be made on communications following the analyst day while also outlining areas of focus for the near-term.

Cammy Duong, Director at MacDougall Biomedical Communications, provided this summary.

GDPR and the U.S. Market: Privacy Policy for IR Teams

Courtesy of:



By now, you have probably heard of "GDPR", the new EU regulation cited in numerous recent events - most notably in the cases of Facebook and Cambridge Analytica. The European General Data Protection Regulation (EU-GDPR) officially came into effect on May 25, 2018. However, for many teams located outside of the EU, the implications of this extra-territorial regulation remain unclear. What impact does GDPR have for US companies? How could this affect IR teams?

GDPR is an EU-wide piece of legislation created to protect the personal data and privacy of EU citizens - centered on how personal data is collected, processed, and if necessary, deleted. It is key to note that the regulation is not limited to companies and individuals situated on EU soil. The data of EU citizens worldwide is now protected under GDPR, no matter where they are located.

Under GDPR, teams must be able create processes to allow individuals to approve the collection of their data, ensure specific processes exist concerning processing this data, and create secure environments to safeguard this information and properly erase it (if required to by an EU national).

Any company that has touchpoints with EU citizens - be it in terms of vendors, suppliers, employees, or investors – must be proactive in creating protocols and infrastructure to properly handle their personal information.

This could have significant implications for IR teams, even if they are in the US. First and foremost, teams must be able to properly process and store the personal information of their global investor bases (retail or institutional) and analysts.

When blasting stakeholders with event information (e.g. an analyst day), contacts with press information (e.g. the success of a clinical trial), or any other outreach, GDPR may now affect the legitimacy of these communications. This may require collaboration with internal teams (such as HR, Procurement, or IT) to ensure full compliance and the development of adequate procedures and infrastructure.

By getting "ahead of the ball" on GDPR and communicating this to investors and stakeholders, teams can now create a competitive advantage over their peers - this can be a good indicator that a company is taking proactive steps to mitigate potential risk in this area, and that they are abreast of changes in the global regulatory environment.

Still have questions? Get more color on the effects of GDPR on US companies in our latest blog post here: <https://blog.egs.com/gdpr-in-the-us/>

The 4th Annual
NIRI
Chapter Reception



Join your fellow NIRI chapter colleagues from the Boston, Chicago, New York, San Francisco and Silicon Valley chapters at the annual conference in Las Vegas. Stop by La Cave's Patio and Lounge, overlooking the Wynn's elegantly landscaped resort pool and gardens, for a drink and a nibble before heading over to the conference's opening reception (a short walk away) or out to dinner.

PLACE: La Cave Lounge and Patio, Wynn Las Vegas



[CLICK HERE TO RSVP TO THIS EVENT](#)

**This event is complimentary and open to NIRI Chicago, New York, Boston, San Francisco, and Silicon Valley chapter members. Pre-registration is required.*

Complimentary Red Sox Ticket Raffle for NIRI Boston Monthly Meeting Attendees



Sponsored By:

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NIRI Boston members attending monthly chapter meetings from now through June will be eligible participants in a free drawing at each of our monthly meetings for two premium seats to attend a Red Sox weekend game. The seats are located atop the State Street Pavillion, providing comfortable seating and a fantastic view of Fenway Park.

NIRI Boston IR Mentorship Program

The NIRI Boston Board is piloting a Mentorship Program, which pairs IR practitioners new to the profession with experienced IR veterans from the NIRI Boston Chapter.

Due to its complex and multidisciplinary nature, new IROs may find the profession confusing and very challenging at first. Through a series of 1x1 meetings and ad hoc support, the program aims to facilitate the transition of new IROs into the role. Mentors act as a confidential source of guidance on both specific IR related questions and general career matters.

At the same time, the program aims to offer mentors a rewarding leadership experience, while providing all participants the benefits of connecting with another colleague in the profession.

If interested in participating, please email info@niriboston.org.

Apply for a Higgins Scholarship!

NIRI Boston is now accepting applications for the R. Scott Higgins Memorial Scholarship for Continuing Education in Investor Relations. These scholarships provide recipients with a Body of Knowledge IRC Reference Book and full payment for an Investor Relations Charter (IRC)

exam.

Submissions for the June 2018 exam are currently being accepted on a rolling basis.

Click [here](#) for further details.

NIRI Boston
www.niriboston.org

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