

NIRI Boston Weekly Newsletter

IRO Career Panel Next Monday - May 20th in the Seaport!



May 2019 - IRO Panel The Many Paths to Investor Relations Sponsored by NASDAQ

Date: May 20, 2019
Time: 5:30 p.m.
Location: LogMeIn Headquarters
333 Summer Street
Boston, MA

There are numerous ways to enter the IR profession. Please join us for a discussion on IR best practices led by investor relations officers that entered the profession from differing backgrounds. Come hear about the challenges they faced transitioning into IR, how their unique skill sets have translated to best-in-class IR, and how these lessons may be applied to you and your career.

Click [here](#) to register.

Note: IRC Holders will receive one professional development credit for attending this event.

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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.

June 2019 - 5th Annual Chapter Meet Up at NIRI National

Date: June 2, 2019
Time: 5 p.m. to 6 p.m. AZ
Location: JW Marriott Desert Ridge, Phoenix

Join your fellow NIRI chapter colleagues from the Chicago, New York, San Francisco and Silicon Valley chapters at the annual conference in Phoenix.

Stop by for a drink and some hors d'oeuvres before heading over to the conference's opening reception (a short walk away) or out to dinner.

This event is complimentary and open to NIRI Chicago, New York, Boston, San Francisco, and Silicon Valley chapter members. Exact location within the JW Marriott will be announced soon and registrants will be informed by email.

Pre-registration is required. Click here to [register](#).

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NIRI Boston Gold Sponsors



June 2019 - Season Finale

Date: June 17, 2019

Time: 5:30 p.m.
Location: Harpoon Brewery
306 Northern Ave
Boston, MA

Join your NIRI Boston colleagues in celebration of another fantastic programming year! The Harpoon Brewery & Beer Hall has become a must-see in Boston's Seaport District, offering a full selection of Harpoon beers and ciders in a casual and fun atmosphere. The event also will include a host of appetizers and the brewery's famous pretzels. In addition, NIRI Boston will be announcing its 2019 Hall of Fame inductee at this event.

Members are encouraged to bring a guest at no cost.

Click [here](#) to register.

NIRI's Inaugural "40 Under 40" Class

NIRI's "40 Under 40" program recognizes young professionals who have made noticeable contributions to their companies, communities, the IR profession, and to NIRI. NIRI will honor this inaugural class during the 2019 NIRI Annual Conference in Phoenix.

Congratulations to three NIRI Boston members who were selected for the 2019 Class of Inductees

- **Jamie Bernard**; Senior Associate, Sharon Merrill Associates
- **Josh Brodsky**; Director, Investor Relations & Corporate Communications, Alnylam Pharmaceuticals
- **Jackie Marcus**; Vice President, Alpha IR Group

Four Ways to Optimize Your IR Processes and Build Strategic Value

Q4

The scope of the IRO role has been expanding. With the rise of new technologies, along with a changing regulatory landscape and a reduced sell-side, you're expected to add increasing value in a greater myriad of functions. To ensure you have time for those inevitable fire-drills, completing your daily responsibilities efficiently and consistently is essential. Here are a few approaches to improving the way you work and crushing your goals:

1. Streamline your workflow and think "LEAN"

There's always an opportunity to streamline your earnings cycle. Bringing the right people into the process, at the right moment, ensures that they're adding value when and how they're most needed. Taking this [LEAN approach](#) can reduce workloads and improve the end product.

LEAN is the application of techniques that remove waste. Start with a value stream map, which allows you to visualize who, what, where, and when people and resources come into your process. This enables you to identify how to most effectively use your team and make the most out of everybody's time.

Q4



Recent NIRI Boston Meeting Recaps

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

[March 2019: Eric Barker on Grit](#)

[Feb 2019: Point72's Perry Boyle Jr.](#)

[January 2019: Managing Your Career with Drift's CFO Jim Kelliher](#)

[May 2018: All About Analyst Days](#)

[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](#)

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2. Integrate best practices and embrace innovation

From your CRM, to shareholder intelligence and market insights, it's essential to integrate best practices with the right technologies and tools. While historical experience is comforting, try to keep an eye on peers who may have found a better way. Leveraging innovative methods and technologies can reduce your workload, improve your impact, and elevate your program.

3. Automate tasks

Set-up an automated process for pulling data and constructing reports. "Standardizing" tactical work enables you to perfect the end product, and reduce the time you spend creating it. Apart from making mundane tasks more efficient and minimizing human error, it also frees up your time to focus on driving strategic value and engaging with your investors.

4. Leverage expert advice

Enlisting the help of an "[IR Partner](#)" can help you fill in the gaps, from communications and financial expertise to headcount resources. Raise your game by leveraging seasoned advice to plan your investor days and NDRs, choose the best conferences, target the right prospects etc. Best practice counseling can dramatically improve your engagement and visibility.

At Q4, we believe that by working with the right partner and arming yourself with the right technology, you can drive strategic value. The IR Success Platform is designed to help IR teams, of all sizes and shapes, optimize processes and run impactful programs.

Read the full article [here](#).

Complimentary Red Sox Ticket Raffle for NIRI Boston Monthly Meeting Attendees



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The Proxy Advisory Group, LLC

NIRI Boston members attending monthly chapter meetings from now through June will be eligible 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 Pavilion, providing comfortable seating and a fantastic view of Fenway Park.

Taking the IRC exam in November?

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 November 2019 exam are currently being accepted on a rolling basis.

Please send an email to [NIRI Boston](#) to apply.

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 send an email to [NIRI Boston](#).

[NIRI Boston](#)