



magazine


Lean and mean in 2016:  
Effective IR with limited resources

In association with **Bloomberg**



Neil Stewart  
Editorial Director  
IR Magazine

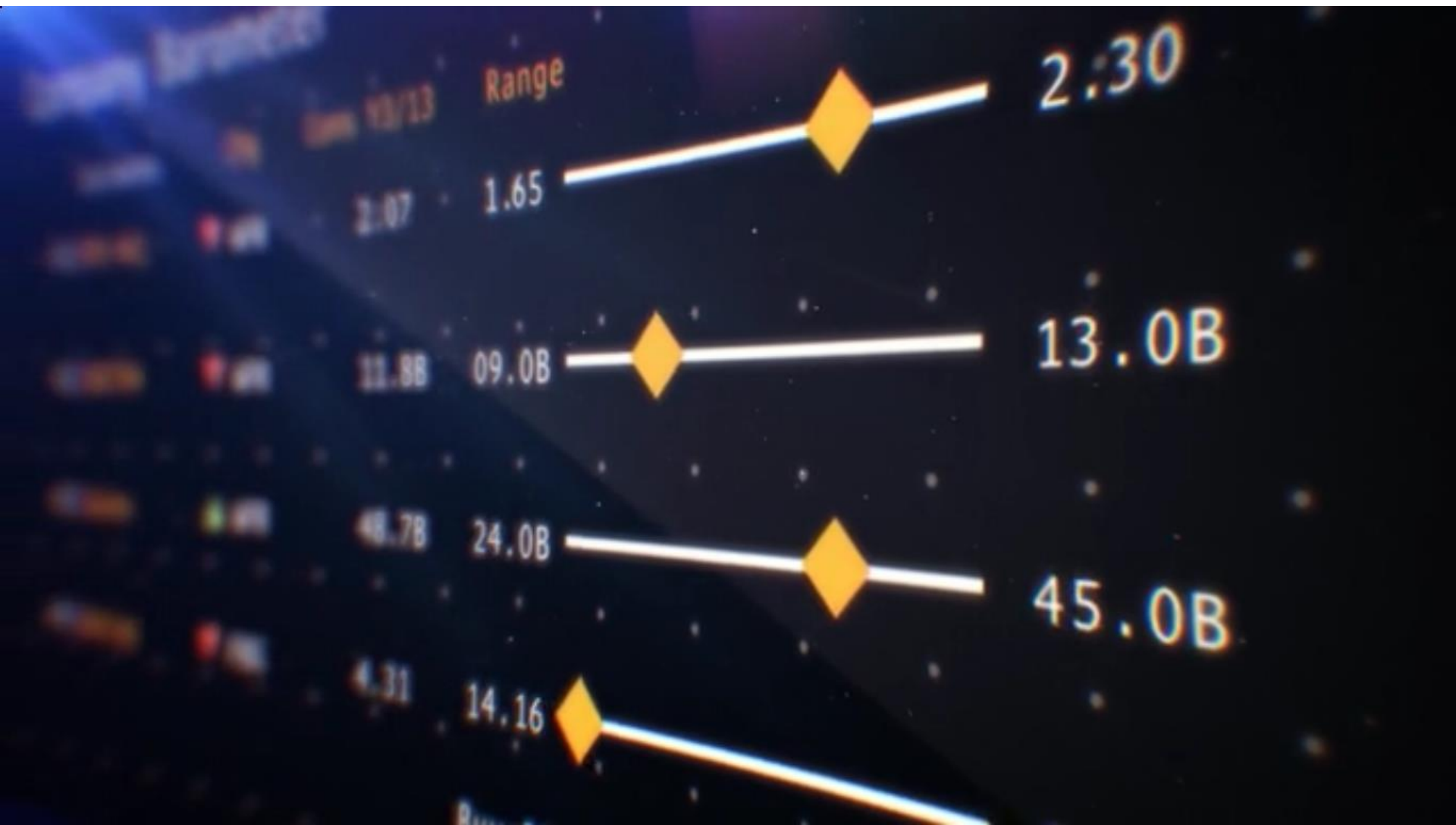
In association with **Bloomberg**

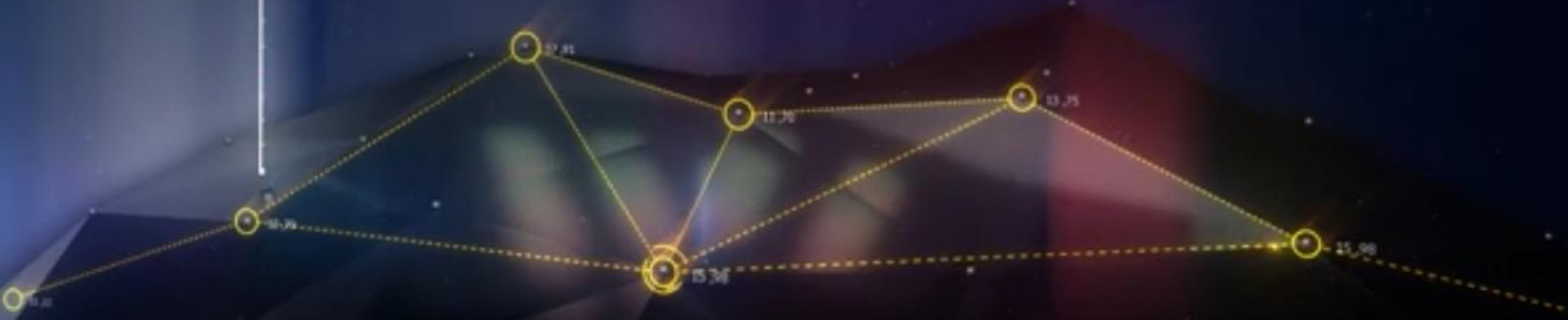
A blurred, high-angle photograph of a modern office interior. In the foreground, a man in a dark suit and a woman in a dark dress are walking away from the camera towards a large window. The background shows other office workers and a bright, overcast sky. The overall tone is professional and corporate.


**Bloomberg**

**FOR INVESTOR RELATIONS**








A blurred, high-angle photograph of a modern office interior. In the foreground, a man in a dark suit and a woman in a dark dress are walking away from the camera towards a large window. The background shows other office workers and a cityscape visible through the glass. The overall tone is professional and corporate.

**Bloomberg**

**FOR INVESTOR RELATIONS**

A blurred office scene with people in business attire standing near a window with a city view. The image is faded and serves as a background for the text.

**Learn more:  
[www.bloomberg.com/investor-relations](http://www.bloomberg.com/investor-relations)**



- Operating on lean budgets
- Effect of shrinking team sizes
- Prioritizing management's time
- Targeting investors most efficiently
- Investor meetings without management teams

# Speakers



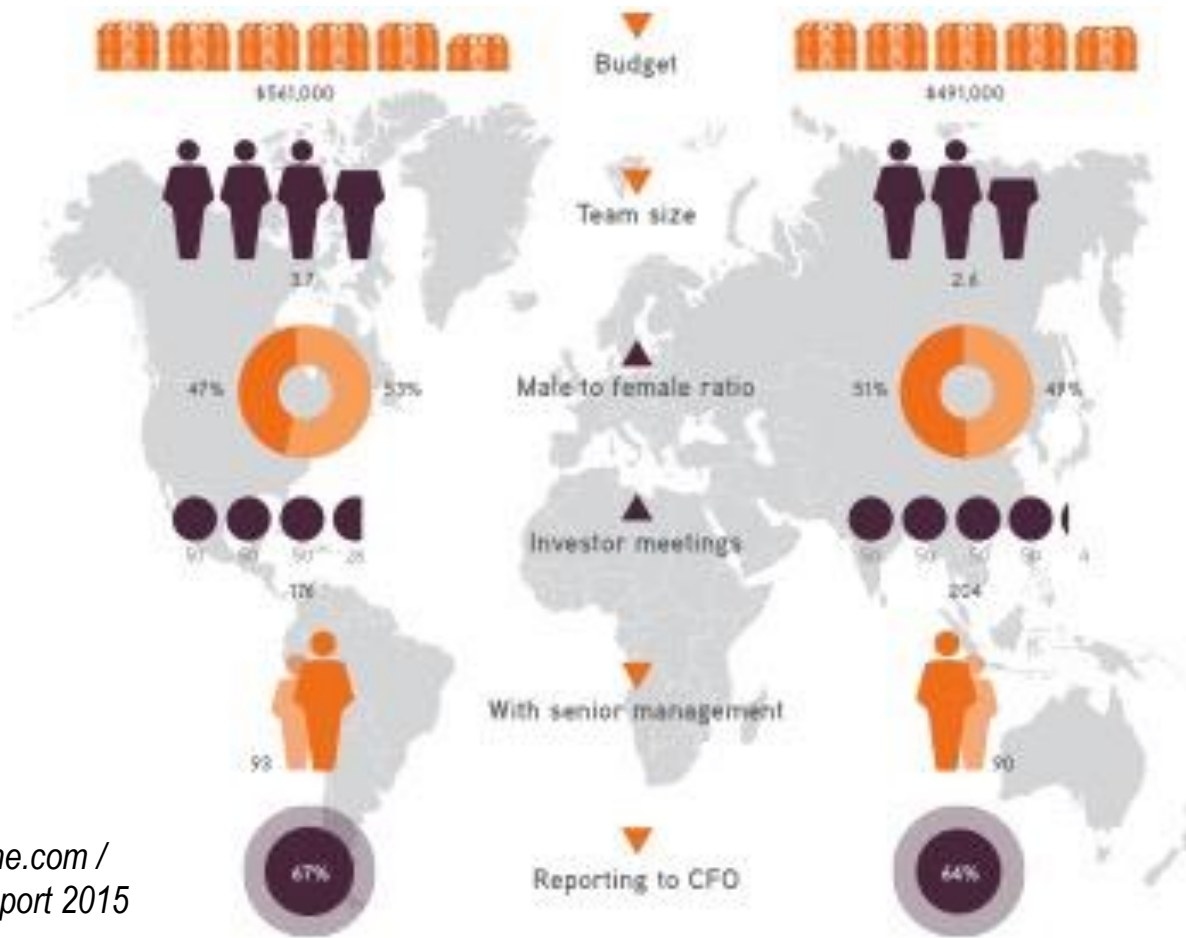
Jonathan Pinto  
Vice President, Investor Relations,  
Genworth Canada



Michael Sullivan  
Vice President, Investor Relations,  
Applied Materials

# Five-year trends

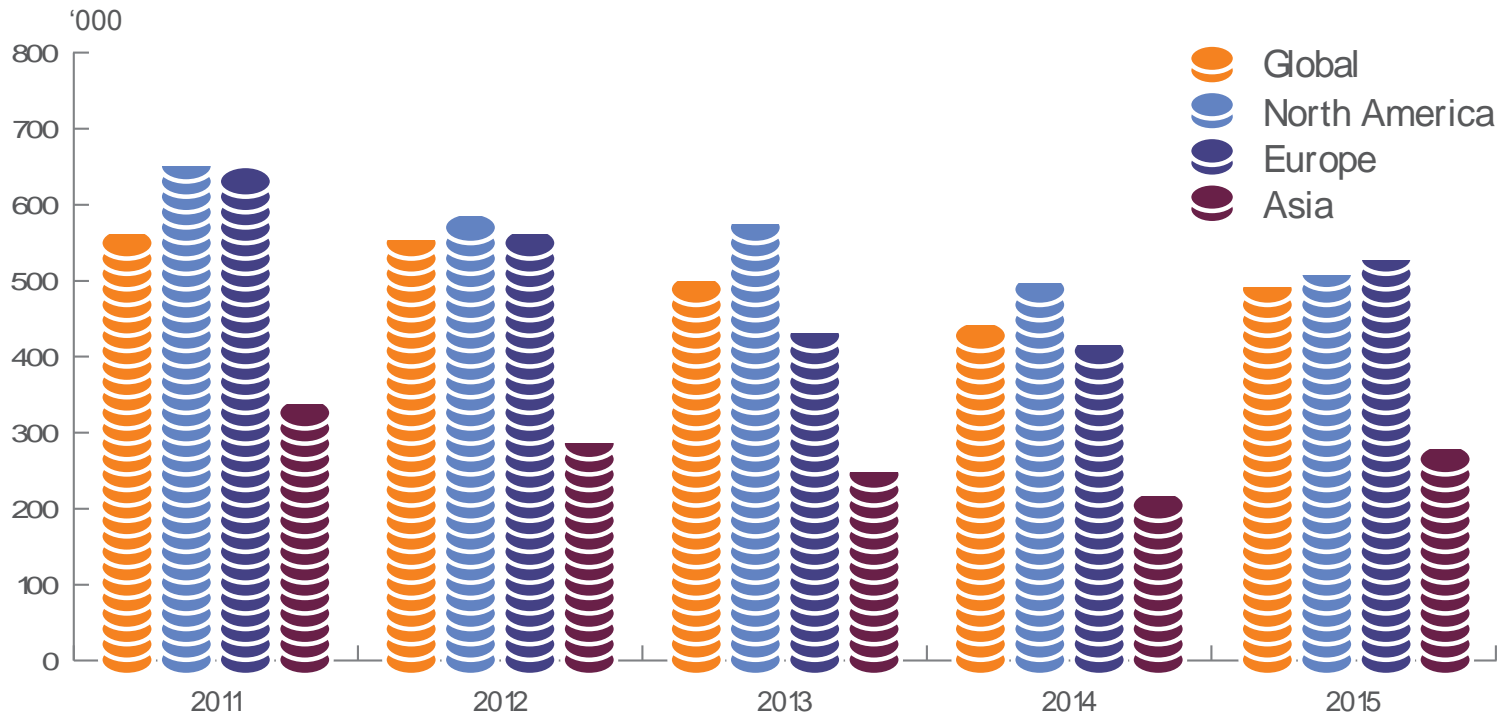
## IR 2011 VS TODAY



Source: IRmagazine.com /  
Global Practice Report 2015

# Falling budgets

## IR 2011 VS TODAY



Source: IRmagazine.com /  
Global Practice Report 2015



Jonathan Pinto  
VP, IR, Genworth Canada  
Toronto, Ontario



Michael Sullivan  
VP, IR, Applied Materials  
Santa Clara, California

## Reallocating responsibilities, eg:

- Events
- Analytics
- Internal reporting
- Sell-side vs buy-side relationships

## Using other teams within the company, eg:

- Finance
- Marketing
- Sales
- Legal



Jonathan Pinto  
VP, IR, Genworth Canada  
Toronto, Ontario



Michael Sullivan  
VP, IR, Applied Materials  
Santa Clara, California

## Controlling money spend

- Vendors
- Data providers
- Travel

## Controlling time spend

- Prioritizing management's time



Jonathan Pinto  
VP, IR, Genworth Canada  
Toronto, Ontario



Michael Sullivan  
VP, IR, Applied Materials  
Santa Clara, California

## Maximizing benefit

- Holding sell side accountable

## Different formats

- Conferences
- NDRs
- Bus tours
- Site visits



Jonathan Pinto  
Vice President, Investor Relations,  
Genworth Canada



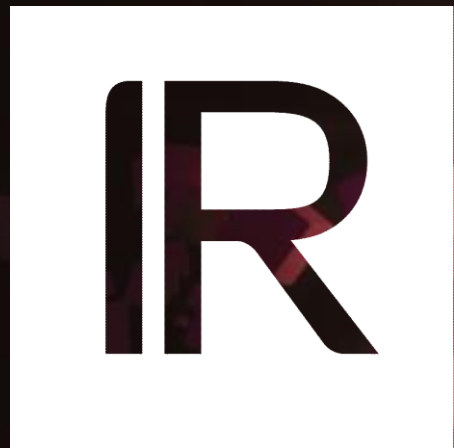
Michael Sullivan  
Vice President, Investor Relations,  
Applied Materials



# Thank you

The webinar recording will be available on IRMagazine.com shortly along with a copy of these slides

If you wish to contact us about this webinar or any other matter, please email: [info@irmagazine.com](mailto:info@irmagazine.com)



magazine

Thank you

In association with **Bloomberg**