The Investor Relations Network

An inclusive peer community for IR and marketing professionals in private markets

**please note times and dates may be subject to change*

January 2025

Executive Coaching Workshop – Developing Talent

Date: January 21
Format: Virtual, Q&A
Join us to learn how the way employers provide development opportunities has changed. Careers no longer follow the traditional corporate ladder, with people often moving sideways to better themselves in different roles and areas and learning on the job. In this session, we will:
• Recognize the types of development activities that drive personal growth.
• Explore the skills required to have good coaching conversations.
• Provide participants with a methodology to structure coaching conversations that drive individual accountability for development

Executive Coaching Workshop – Engaging Your Team for High Performance

Date: January 28
Format: Virtual, Q&A
Join us to learn how you can get the best out of your employees. High performance extends beyond a paycheck, so understanding how to engage and motivate your team is critical. In this session, we will:
• Explore the research behind motivation and identify what is in our control as managers as we seek to motivate our teams.
• Discuss how these elements of motivation come into play when we assign work to our teams.
• Be able to adjust our leadership style to the individual, to have effective conversations that maximize performance and engagement.

February 2025

Meet your Investor Relations Network Advisory Board + Firm and Fund Branding: Setting the Firm & Fund Apart

Date: February 20
Format: Virtual, Q&A
Join your Investor Relations Advisory Board Members for discussion on:

- How to differentiate your firm/fund strategy, processes, and related messaging
- Developing a clear brand identity and would be helpful to discuss
- Creative avenues/tools that people enhance their marketing.

PEI

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March 2025

Investor Relations Network Forum

Date: March 26-27, Convene, 360 Madison Avenue, New York
Format: In-person, 2-day member-only conference
The must-attend marquee event for senior Investor Relations executives in private markets to share best practices, connect on shared challenges and forecast the year ahead. The Investor Relations Network flagship event offers connection and insight for all members on a global scale.

- Fundraising tactics for the year ahead.
- Attracting and retaining investors.
- Talent retention and recruitment.

Executive Coaching Workshop – How to Persuade Key Stakeholders Faster

Date: March 31
Format: Virtual, Q&A
Join us to learn best practices in speeding up the influencing and persuasion process. In particular, the speeding up of connecting, trust building, and influencing of with key stakeholders in 1-1 meetings.
Learning Objectives:
In this session, we will:

- Introduce simple ways to assess how connected you are to a stakeholder
- Identify the signs that they are losing interest, putting up barriers, or simply aren't interested
- Learn how to reframe your argument, focusing on their goals to appeal to them
- Discuss the art of being persuasive under pressure, and the importance of retaining power in the room

April 2025

How to Source New Leads

Date: April 3
Format: Virtual, Q&A
Join your Investor Relations Network for discussion on:

- Marketing strategies and tactics to source new leads
- How conferences and events can help
- Networking with peers and how to build that base as a resource

Q1 Fundraising Review

Date: tbc
Format: Virtual, Q&A
Hear from PEI's Research and Editorial teams on Q1 fundraising trends

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May 2025

Getting the meetings with LPs

Date: May 8
Format: Virtual, Q&A
Join your Investor Relations Network for discussion on:

- Marketing strategies and tactics to secure meetings
- How your initial touchpoints set the cornerstone of the relationship
- Understanding LP requirements and preferences in the beginning phase of the relationship

Supper Club - NYC

Date: May 15
Format: In-person
Come join your fellow Investor Relations Network members for cocktails followed by a thought leadership roundtable on Communications with LPs

- Should the industry standardize IR communication with LPs?
- Cadence of investor communication – how much is too much and how much is too little
- How are we seeing the role of the IR function shift and what are the changing expectations of the role?

June 2025

Closing the deal with LPs

Date: June 5
Format: Virtual, Q&A

- What are some important considerations for closing the deal
- How do you set the cadence of investor communications
- How to best handle questions around topics such as DPI, fewer exits, etc.

Executive Coaching Workshop – Reducing Friction Early Between Seniors and Juniors

Date: June 12
Format: Virtual, Q&A
Join us to discuss best practices and common headaches when supervising, supporting, and working with younger team members. In this session, we will:

- Discuss the friction points in working practices between senior players (Boomers/Gen X) and junior players (Millennials/Gen Z), leveraging the room's observations and experience
- Identify what micromanagement is versus coaching and why some people always seem to feel micromanaged
- Leverage the interview, onboarding, or 1-1 meeting process to uncover how they work best, how they define micro-management, and what they believe is a fair and preferred way to communicate and negotiate on process, deliverables, deadlines, consequences, short-term goals, and rewards (the communicating and negotiating yours to them – including when it is appropriate to ask "Why?" versus just doing it

- Introduce the benefits of “Reverse-Mentoring” to inter-generational relationships

Executive Coaching Workshop – Building an Executive Presence Using Gravitas and Reading the Room

Date: June 17
Format: Virtual, Q&A
Join us to learn how to build an executive presence during and outside of meetings. In this session, we will:

- Identify and discuss your Gravitas when entering a room and discuss ways to vary this depending on who is in the room, and what their needs are. We will look at gravitas needs from the perspective of investors, operators, and associates, and the challenges CFO’s face in meeting these needs
- Teach you how to monitor and be deliberate in your tone, body language, posture, placement, and verbal habits to maximize your executive presence, as well as introduce a tool called the PVA that can help measure your gravitas
- Develop impression management awareness and skills while understanding the threats others bring in terms of their bias and perceptions

Executive Coaching Workshop – Coaching 1-1

Date: June 24
Format: Virtual, Q&A
Join us to learn how to apply best practices to 1-1 coaching of direct reports. This can be challenging if we are not connected, lack a plan, don’t know how to navigate their emotions, or we find ourselves lecturing followed by awkward silence. In this session, we will:

- Outline ways to increase the speed of connection, and the importance of monitoring and maintaining it throughout the conversation, along with identifying early on where they are now, and where they are headed as we introduce the GROW model
- Assess and adapt to their personality, their emotional state, and their need for a transactional or transformational coaching style, as well as monitoring your bias going into the conversation
- Apply best practices around how and when to question, empathize, and reciprocate via storytelling to improve outcomes

July 2025

How to Tap into the Family Office Market

Date: July 15
Format: Virtual, Q&A
Join your Investor Relations Network for discussion on:

- Marketing strategies and tactics for the family office segment
- How to build your base of family office contacts
- What are trends in the market across family offices (flexibility, terms, etc.)

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August 2025

Fundraising abroad
Date: August 12
Format: Virtual, Q&A
Join your Investor Relations Network for discussion on:

- Marketing strategies and tactics for attracting foreign investors
- What are some of the key trends in the international markets (e.g., Middle East, etc.)
- Other considerations for developing international relationships (e.g., timelines, cultural differences, etiquette, etc.)

Q3 Fundraising Review
Date: tbc
Format: Virtual, Q&A
Hear from PEI's Research and Editorial teams on Q3 fundraising trends

September 2025

Crisis Communications
Date: September 11
Format: Virtual, Q&A
Join your Investor Relations Network for discussion on:

- Learn crisis communications frameworks to apply for your investor communications
- How to manage your stakeholders when a crisis occurs
- Other considerations for crisis communications (e.g., transparency, cadence, communication channels, one way and two-way communications, etc.)

October 2025

What to do when you're not Fundraising
Date: October 9
Format: Virtual, Q&A
Join your Investor Relations Network for discussion on:

- Share best practices for crm, data management, and analytics/reports
- How to manage all of your aggregated research while in pre-fundraise phase
- What you can do to 'always be fundraising' even when not officially in market

Executive Coaching Workshop – Changing Your Brand and Perceptions of You Over Time (Outside Your Organization)
Date: Oct 21
Format: Virtual, Q&A
Join us to learn how to develop your reputation outside your organization. To be thought of as a

competent professional who cares about other's success.

In this session, we will discuss:

- Common barriers to building and rebuilding a brand externally including in virtual settings, via LinkedIn, and at professional events – these may include being seen as intimidating, aloof, having power distance, overly negative, closed-minded, overly dominant, or just due to censorship from your legal team
- Provide techniques to reset and develop your brand over time through impression management, relationship credits, influencer content, mentorship & reverse mentorship, association volunteering, and building the depths of your contact list
- Learn how to use the bridge technique to win over others in a group setting when you at first get resistance
- Identify how to leverage your internal firm resources such as Marketing/PR to increase exposure and develop your brand as an expert. Additionally, learn what organizations like PEI can do or suggest impacting your reputation

Executive Coaching Workshop – Shifting from Expert to Non-Expert Leader: How to Lead When You Aren't the Expert in the Room

Date: Oct 23
Format: Virtual, Q&A
Join us to learn how leaders can add value in team meetings, even when the topic isn't their expertise.
In this session, we will:

- Uncover the fears and beliefs managers have that lead to imposter syndrome, which often limits their questions and comments
- Discuss leader gravitas and its impact on energy and contributions of the team during meetings
- Apply principles of leadership coaching in meetings when you aren't in charge, nor are the expert, to foster strategic group discussions and gain the respect of the room

Executive Coaching Workshop – Working with And Managing Different Personalities

Date: Oct 28
Format: Virtual, Q&A
Join us to learn how employees of all backgrounds fall into one of four dominant work personality categories and understand what makes them tick. In this session, we will discuss:

- Breakdown the four categories by: imaginative talkers, detail workers, decision makers, peacekeepers, and additional combinations of work context personality
- Discuss which work personality causes finance professionals the most challenges
- Unpack hot buttons and motivational drivers for each category

November 2025

How to tap into the Insurance Market

Date: November 13
Format: Virtual, Q&A
Join your Investor Relations Network for discussion on:

- How do insurance companies fit into the institutional investor space

- What are some of the trends we are seeing around insurance companies desire within private market investments (e.g., fund types, asset classes, geographies, co-investment, etc.)
- The future of insurance companies as LPs

December 2025

How to create Events & AGMs that LPs love

Date: Dec 9
Format: Virtual, Q&A
Join your Investor Relations Network for discussion on:

- How to communicate and create events that LPs will travel to attend
- Virtual, hybrid, and in-person events – what is everyone doing these days?
- Share successful event strategies

PEI LP Perspectives

Date: tbc
Format: Virtual, Q&A
Hear from PEI's Research and Editorial teams on LP perspectives