



ABPCO

Association of
British Professional
Conference Organisers

CONNECTING EVENT PROFESSIONALS

OFFICIAL

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STRATEGIC INSIGHTS REPORT
from the ABPCO
AGM

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1. Executive Summary

The ABPCO 2025 Annual General Meeting underscored a pivotal moment for the association, revealing a decisive shift from a period of stabilisation to one of confident, proactive growth. The overarching sentiment was one of tangible optimism, underpinned by the strategic deployment of significant financial strength and a clear validation of its forward-looking initiatives.

A dominant theme was the association's exceptional financial health, which has moved beyond simple security to create significant strategic "headroom." This financial foundation enables a validated growth strategy that has already surpassed long-term revenue goals and is driving "phenomenal" membership expansion, fueled by a data-informed approach and a revitalised marketing strategy aimed at "retelling the ABPCO story" to a broader audience.

The AGM also illuminated that the core of ABPCO's value proposition remains its vibrant and deeply engaged community. With nearly 50 events and over 1,000 attendees in the past year, discussions consistently reinforced that the association's identity is defined by its collaborative "tribe" culture, where knowledge-sharing and professional development are the primary drivers of member loyalty.

Finally, the announcement of a pivotal leadership transition emerged as a crucial strategic focal point with the upcoming retirement of Association Director **Heather Lishman** after a 14-year tenure. This marks a significant inflection point, presenting the primary challenge of ensuring a seamless succession while preserving the remarkable momentum of the past year. The primary strategic implication is the urgent need for the executive board to leverage the association's current financial and strategic strength to navigate this transition without disruption. The risk lies not in the change itself, but in any potential loss of focus that could temper the current trajectory of ambitious growth.

2. Key Themes and Trends

This section deconstructs the core strategic themes that emerged from the AGM, supported by direct data and quotes from the session.

2.1 Financial Strength and Strategic Headroom

The financial report, delivered by Treasurer **Kate Sargent**, was a cornerstone of the AGM, establishing a narrative of stability, security, and significant future potential. The association is not only financially healthy but has cultivated a strategic surplus that allows for proactive investment rather than reactive management.

2.1.1 Impressive Financial Performance

The financial results for the 2024-2025 year significantly exceeded expectations. **Kate Sargent** reported revenue of **"just over 220,000 pounds"** and an **"overall surplus in our audited accounts of just under 60,000 pounds."** This performance signals effective operational management and successful revenue diversification, particularly through the introduction of delegate fees.

2.1.2 A Robust and Exceeded Reserves Policy

A key element of the financial strategy is a disciplined reserves policy. The association has far surpassed its targets, building a formidable financial cushion. As **Kate Sargent** outlined, the savings account holds **"just over 300,000 pounds,"** well above the required £170,000 for contingency and strategic reserves. This has created a critical advantage for the organisation.

"The most important part of this information that I'm sharing is the gap between the two, and that is what I call headroom... We have headroom, and what that means is that we have built up money that we can spend supporting our membership, taking our activities forward, and investing in our future." — Kate Sargent, Treasurer, ABPCO

2.1.3 Sentiment Analysis: Highly Confident

The tone of the financial discussion was overwhelmingly positive and confident. The detailed reporting and the concept of "headroom" provided members with a clear sense of security and optimism about the association's capacity to invest in new and existing initiatives.

2.2 Validated Growth Strategy Yielding Tangible Results

The AGM highlighted a clear, data-driven strategy for growth that is proving highly effective. This theme encompasses membership expansion, brand repositioning, and targeted marketing efforts that are successfully broadening ABPCO's reach and appeal.

2.2.1 Strategic Goal Achievement and Membership Expansion

The association has already surpassed one of its primary long-term goals. Co-chair **Pauline Beattie** noted that while the goal was **"200K in revenues by 2027,"** the organization has **"already smashed goal number 2, which is absolutely amazing."** This is coupled with "phenomenal" growth in both in-house PCO and associate memberships. A key governance decision to support this was the successful proposal for a new **"Allied Membership"** category, designed for independent consultants, who do not currently qualify for the existing membership types.

2.2.2 Data-Informed Membership Strategy

The Growth Taskforce, represented by **Steve Daun** and **Samantha Shamkh**, presented findings from a comprehensive survey of members and non-members. This research identified key barriers (financial constraints, complex processes) and drivers (learning development, networking). The taskforce is now acting on these insights to **"review the membership application process"** and better communicate the value proposition.

2.2.3 Marketing Success and Brand Repositioning

The new marketing partnership has been instrumental in reshaping the association's external image. The strategy was to move beyond the established brand recognition and actively engage a new generation.

"We approached building a new strategy for ABPCO to attract a new broader audience, by retelling the ABPCO story." — **Debra Nightingale, Marketing & Comms Partner, Albright**

This "retelling" has produced tangible results. **Madalina Marincas** of the Social Media taskforce reported reaching "401" Instagram followers (exceeding their target of 400) and building "over 1000 followers since April last year" on LinkedIn.

2.2.4 Sentiment Analysis: Energetic and Ambitious

The dialogue around growth was forward-looking and full of energy. The combination of achieving financial goals ahead of schedule and seeing clear results from new marketing and research initiatives has created a strong sense of momentum and ambition for the future.

2.3 Deepening Member Value Through Engagement and Community

The core of ABPCO's identity and value proposition, as presented at the AGM, is its highly engaged community and the wealth of opportunities it provides for professional development and networking.

2.3.1 Extensive and High-Impact Events Program

The Learning Taskforce is a powerhouse of activity. **Samantha Salisbury** detailed a packed schedule of *"49 events in total"* last year, ranging from *"monthly coffee and chat sessions"* to the *"Festival of Learning in Birmingham."* This extensive program is demonstrably engaging members, with Co-chair **Sammy Connell** reporting **"over 1000 attendees at our events over the last 12 months."**

2.3.2 Emphasis on Inclusivity and Best Practice

A recurring point was the focus on making events more inclusive and a platform for sharing best practices. This was highlighted in the commitment to EDI and sustainability.

"We now ensure that we have wellness rooms at all of our events where we can support attendees, but also we want to inspire our PCOs to consider this for their events and venues... They've seen how popular it is and what positive impact it makes, and now this has become standard." — **Sammy Connell, Co-chair, ABPCO**

2.3.3 Quantifying the Industry's Economic Impact

The Advocacy Taskforce, led by **Leanne Planche**, provided powerful statistics that underscore the collective value of the membership. According to her report, members have collectively managed events generating **"48 million pounds worth of sponsorship"** and

served **"over a million delegates"** across 6,336 events. This data provides a crucial advocacy tool and reinforces the importance of the PCO sector to the wider economy.

2.3.4 Sentiment Analysis: Collaborative and Appreciative

The discussions around member engagement were filled with a sense of shared purpose and mutual appreciation. The frequent "thank-you's" to volunteers, the celebration of member successes, and the description of ABPCO as a "tribe" all point to a strong, collaborative, and supportive community culture.

2.4 Pivotal Leadership Transition and Governance Evolution

Alongside celebrating success, the AGM addressed significant changes in governance and leadership, marking a critical transition period for the association.

2.4.1 Acknowledging a Legacy

The most significant moment of the AGM was the announcement of the forthcoming retirement of **Heather Lishman**, the Association Director, after 14 years of service. The announcement was handled with deep respect and appreciation for her contributions to the organisation.

"Heather announced that she is going to take early retirement at the end of this year... it's really, really hard to imagine there not being a Heather, so we're looking forward to the next 6 months in terms of making sure that Heather has the best sendoff ever." — **Pauline Beattie, Co-chair, ABPCO**

2.4.2 Managing Succession

The announcement immediately pivoted to the practicalities of succession. The board is preparing to **"kick the recruitment process off officially at the beginning of the summer,"** signaling a structured and transparent approach to finding a replacement. This transition will be the central operational challenge for the board over the next six months.

2.4.3 Evolving the Executive Board

The meeting also formalised a significant refresh of the executive board, thanking departing members for their service and officially voting in a new cohort of representatives from across the industry. This regular churn is built into the governance structure and ensures a continuous flow of new perspectives and energy into the leadership team.

2.4.4 Sentiment Analysis: Reflective and Forward-Looking

The sentiment during this phase of the meeting was dual-sided. There was a deep sense of gratitude and reflection on **Heather Lishman's** tenure, coupled with a pragmatic, forward-looking focus on the task of succession and onboarding new leadership. It was a moment of acknowledging the past while actively planning for the future.

3. Opportunities & Challenges

The strategic discourse at the ABPCO 2025 AGM illuminated a clear set of pivotal opportunities that the association is poised to capture, alongside persistent challenges that demand rigorous and proactive management.

3.1 Key Opportunities

- **Strategic Investment Through Financial Headroom:** Leveraging the significant financial surplus—with reserves "just over 300,000 pounds" against a £170,000 requirement—to invest in high-impact initiatives. As articulated by Treasurer **Kate Sargent**, this "headroom" provides a rare opportunity to fund new technology, enhanced educational programs, and other member-value projects without compromising financial stability.
- **Expansion into New Member Segments:** The formal approval of the new "Allied Membership" category presents a clear opportunity to attract and serve independent consultants, a previously underserved segment of the industry. This directly expands the association's addressable market and diversifies its membership base.
- **Data-Driven Enhancement of the Member Value Proposition:** Capitalising on the rich insights from the Growth Taskforce survey to streamline the member journey. The identification of specific barriers ("financial constraints," "the processes") by **Steve Daun** provides a clear roadmap for improving the application process and better communicating value to prospective members, thereby increasing conversion and retention.
- **Formalising Strategic Partnerships:** Implementing the new "Partnership Evaluation Matrix" developed by the Advocacy Taskforce under **Leanne Planche**. This provides a structured framework to move from reactive to proactive partnership management, enabling the association to forge more strategically aligned and mutually beneficial collaborations.

- **Elevating Flagship Events:** Building on the phenomenal success of events like the Festival of Learning, which surpassed its attendance target by over 25% with "over 220 people registered." The new PCO tender process for supporting flagship events is an opportunity to further innovate, engage corporate members, and enhance the quality and reach of these cornerstone activities.

3.2 Persistent Challenges

- **Executive Leadership Succession and Knowledge Transfer:** Overcoming the significant challenge of replacing a 14-year incumbent Association Director. The upcoming retirement of **Heather Lishman** necessitates a robust recruitment process and, critically, a comprehensive knowledge transfer plan to ensure operational continuity and preserve institutional memory.
- **Sustaining the Volunteer-Led Engine:** Managing the heavy reliance on the voluntary contributions of its members. The success of the "6 task forces and 9 special interest groups" creates a persistent challenge of preventing volunteer burnout, continually recruiting new participants, and ensuring the workload remains manageable.
- **Closing the Internal Communications Gap:** Addressing the survey finding that existing members are not always aware of the full spectrum of benefits available to them. As **Steve Daun** noted, even with mentorship and other programs in place, "it sounds like our own members don't know about that," highlighting a critical need for more effective internal communication.
- **Integrating a Rapidly Growing Membership:** Managing the successful integration of a large influx of new members, particularly in the associate and student categories. The challenge lies in moving beyond simple acquisition to effectively embedding these new members into the collaborative "ABPCO tribe" culture to foster long-term loyalty and engagement.
- **Maintaining Momentum Amidst Transition:** After a year of exceptional financial and strategic success, a key challenge will be to maintain this positive momentum throughout a period of significant leadership transition. This requires the executive board and task forces to remain highly focused on strategic objectives while navigating the operational demands of the succession process.

4. Evolving Narratives

The ABPCO 2025 AGM not only provided a current look at the association but also showed a clear shift in strategic thinking and the narratives shaping its approach to the future. The discourse moved from a reactive posture of managing present challenges to a proactive stance focused on architecting the future of the association.

4.1 Reactive Adaptation to Proactive Transformation

The event's overarching story moved from an initial focus on how the association is adapting to existing conditions to a more assertive stance on proactively shaping its future. The meeting began with reactive, yet necessary, governance tasks like the approval of "minutes from last year's AGM." This depicted an association fulfilling its procedural duties.

However, the narrative quickly evolved. The financial report from **Kate Sargent** was not just a reactive summary of past performance but a proactive reframing of the association's potential, centered on the concept of "headroom" for future investment. Similarly, the presentation from **Debra** on marketing was not about reacting to market conditions but about proactively "retelling the ABPCO story" to capture a new, younger audience.

This shift from adaptation to transformation became the dominant theme. The discussion moved beyond managing the present to strategically creating "what will be." This was evident in the Growth Taskforce's plan to use survey data to reshape the membership journey and the Advocacy Taskforce's creation of a matrix to strategically select future partners.

"The most important part of this information that I'm sharing is the gap between the two, and that is what I call headroom... we have built up money that we can spend supporting our membership, taking our activities forward, and investing in our future." — **Kate Sargent, Treasurer, ABPCO, illustrating a proactive mindset aimed at leveraging financial strength for future action.**

The narrative culminated in the ultimate proactive challenge: managing the leadership succession of **Heather Lishman**. The focus moved immediately from acknowledging her legacy to defining the process for the association's future, a clear signal of a forward-looking, transformative mindset.

4.2 Audience Reactions & Shifting Viewpoints

The atmosphere of the AGM, judged by the flow of the meeting and the commentary from speakers, reflected a high level of member alignment and a growing understanding of the profound changes underway.

The meeting began with several "reality check" moments that grounded the audience in the procedural nature of an AGM. The formal requests for proposers and seconders for minutes and constitutional changes established a professional, orderly tone.

Conversely, these procedural moments were balanced by tangible encouragement and optimism. The presentation of hard numbers—the **"over 1000 attendees at our events,"** the **"£220,000 revenue,"** and the **"£60,000 surplus"**—provided powerful evidence of progress. The practical and enthusiastic articulation of the new marketing strategy by **Debra** and the detailed financial security outlined by **Kate Sargent** likely transformed the audience's perception of the association from merely stable to strategically potent.

The "overwhelming yes" to the new Allied Membership proposal and the lack of challenging questions when prompted suggest a high degree of trust in the executive board's direction. The most significant shift in viewpoint likely occurred during the announcement of **Heather Lishman's** retirement. This injected a deep, personal, and reflective element into the otherwise business-focused proceedings, shifting the audience's viewpoint from that of members to that of long-standing colleagues and friends, reinforcing the "tribe" identity of the association.

"So in that case, could I ask you to use the reactions and give us a hands up if you are happy to approve Allied Membership... That's looking like quite an overwhelming yes." — **Pauline Beattie, Co-chair, ABPCO, confirming audience consensus and a positive reaction to strategic change.**

4.3 Pivotal Insights & Recurring Concepts

Several recurring ideas and key moments signaled new strategic priorities and significant shifts in professional thinking:

- **Community as a Core Strategic Asset:** The concept of ABPCO as a "tribe" was a dominant recurring theme, emphasizing that the association's primary value lies in its collaborative, supportive, and fiercely loyal community. This was positioned not as a soft benefit but as a core strategic differentiator.
- **Financial Headroom as Strategic Freedom:** The framing of the financial reserves not as a safety net but as "headroom" was a pivotal insight. This shifted the perception

- of the association's finances from defensive and stable to offensive and opportunity-focused, empowering leadership to think bigger.
- **The Narrative as a Strategic Lever:** The explicit call by **Debra's** team to "retell the ABPCO story" for a new audience marked a shift in understanding marketing as a strategic lever for growth and talent attraction, rather than just a communications function.
- **Volunteerism as the Engine of Progress:** The constant and sincere gratitude expressed towards the volunteers on the various task forces underscored the recurring concept that this volunteer engine is the fundamental driver of the association's activity and success.
- **Data-Informed, not just Data-Driven, Strategy:** The use of the member survey to understand the "why" behind member behavior, and the development of the partnership matrix, signaled a move towards a more sophisticated, insight-led approach to decision-making.
- **Legacy and Transition as a Unifying Force:** The handling of **Heather Lishman's** retirement—balancing a celebration of her legacy with a clear plan for the future—was a pivotal moment. It reinforced the stability and maturity of the organisation, turning a potential moment of uncertainty into a unifying call to action for the entire community.

5. Strategic Recommendations

The insights from the ABPCO 2025 AGM necessitate targeted and collaborative action from all segments of the association's ecosystem. These recommendations aim to help capitalise on identified opportunities while proactively addressing the ongoing challenges.

5.1 For the ABPCO Executive Board

- **Champion a Unified Vision for the Leadership Transition:** Make the recruitment of the new Association Director the primary strategic priority. Establish a dedicated succession committee to manage the process, ensuring a comprehensive handover of institutional knowledge from **Heather Lishman** and communicating a clear, confident vision to the membership throughout the transition.
- **Deploy Financial "Headroom" for Strategic Investment:** Move beyond capital preservation and develop a formal investment roadmap for the significant financial surplus. Earmark funds for high-impact projects that directly address member needs identified in the recent survey, such as enhanced technology platforms, expanded educational grants, or new digital resources.
- **Mandate and Systematise Strategic Partnership Evaluation:** Formally adopt the "Partnership Evaluation Matrix" developed by the Advocacy Taskforce. Mandate its use for the review of all existing and potential new partnerships to ensure every collaboration is strategically aligned, measurable, and contributes directly to the association's core objectives.
- **Lead the Transformation of the Association's Narrative:** Lead the "retell the ABPCO story" campaign, using the board's platform to showcase modern PCO work as dynamic, tech-driven, and purpose-driven to attract diverse, high-calibre talent.

5.2 For Task Force Leadership

- **Embrace Cross-Functional Collaboration:** Foster joint initiatives. The Growth and Learning task forces should form a joint working group based on member survey insights. The Social Media task force must establish a formal content pipeline with other task forces to amplify their activities and achievements.
- **Translate Insights into Action:** The Growth Taskforce must prioritise acting on its own survey findings by presenting a formal proposal to the board to simplify the membership application process and payment options—two key barriers identified by **Steve Daun**.

- **Develop a Sustainable Volunteer Pipeline:** Proactively identify and mentor emerging leaders within the general membership to create a sustainable pipeline for future task force roles. This addresses the critical risk of burnout and ensures the long-term health of the association's volunteer-led engine.
- **Adopt a Data-Driven Reporting Cadence:** Standardise reporting metrics across all task forces to clearly demonstrate ROI and impact to the board and membership. Track key metrics like event attendance, member engagement on specific topics, and social media reach to inform future planning.

5.3 For the Marketing & Communications Team

- **Launch a Targeted Campaign for "Allied Membership":** Develop and execute a dedicated outreach campaign to launch the new "Allied Membership" category. Create tailored invitations that highlight its specific value proposition to independent consultants.
- **Systematise the "My ABPCO" Campaign:** Systematise the "my ABPCO" storytelling campaign. Implement a simple submission process for members to share stories and testimonials, ensuring continuous, authentic content showcasing membership value.
- **Develop a "Member Value" Communications Toolkit:** Develop a concise, visually appealing communications toolkit to bridge the internal communication gap. This toolkit, detailing all member benefits, will be communicated via social media, detailed on the website and distributed during onboarding and promoted via newsletters and the online forum.

5.4 For the General Membership

- **Transition from Passive to Active Participation:** Answer the repeated calls to action by actively seeking opportunities to get involved. Volunteer to judge the Excellence Awards, join a special interest group aligned with your expertise, or express interest in joining a task force to directly shape the future of the association.
- **Become Active Brand Ambassadors:** Embrace the "tribe" mentality by contributing to the association's narrative. Share your positive experiences on social media using official hashtags, provide content and testimonials when requested, and actively recommend ABPCO membership to peers and colleagues.
- **Maximise the Value of Existing Resources:** Increase engagement with the tools already available. Utilise the online forums to ask questions and share expertise, attend the diverse range of virtual and in-person events, and actively use the networking opportunities to build your professional community.



6. Snapsight

6.1 About Snapsight

Snapsight is an AI-powered insights platform that transforms your organization's content into actionable insights. We analyse event sessions, surveys, industry reports, internal documents, and more, empowering your organization to make data-driven decisions that drive growth and innovation.

Insights-as-a-Service: Your Affordable Insights Solution Our team of experts partners with you to analyze your data and deliver customized reports that answer your most critical questions. We help you:

- **Identify Emerging Trends:** Uncover key themes, competitor strategies, and market shifts before your rivals.
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- **Make Data-Driven Decisions:** Move beyond guesswork and base your choices on insights derived from your own data.
- **Save Time and Resources:** Let our AI and experienced analysts handle the heavy lifting, freeing your team to take action.

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