



# USING INSIGHTS TO ENGAGE MEMBERS

*and create better events*

Evolve. Engage. Grow. Inspire.  
This was the theme of Professionals  
Congress 2017, a leading annual  
event for financial planners organized  
by the Financial Planning Association  
(FPA) of Australia.

**As a professional association**, the FPA provides  
advocacy and education for over 13,000 members,  
including more than 5,500 certified financial planners.  
The FPA is at the forefront of the movement to  
increase recognition for financial planners in Australia  
and supports its members' advancement through  
professional certification and college degrees.



FINANCIAL PLANNING  
ASSOCIATION of AUSTRALIA

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## FPA OF AUSTRALIA

Membership association  
for advocacy and education

13,000 members

Professionals Congress 2017

### Product highlights

- Insights
- Event Check-In
- Lead Capture
- Session Attendance Tracking

Jomablue

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## SEEKING BETTER INSIGHT INTO MEMBER ATTENDANCE

For as long as Pene Lovett, chief operating officer, has overseen the three-day Congress, she's run it the same way: plan the event, workshops, and guest speakers; hire a professional organizer to oversee the venue, registration, and catering; hold the event; and — fingers crossed! — hope members, exhibitors, and sponsors love it and come back.

The Congress offers access to nearly 50 industry exhibitors and more than 24 workshops to financial planning professionals. In the past, FPA organizers knew who was registered for each workshop and how many continuing professional development (CPD) credits each workshop was worth. But the FPA's only tracking system was a good old-fashioned sign-in paper, so it had no truly accurate way of knowing if members actually attended — or stayed in — any given workshop.

The result? Staff had to record credits based on incomplete information, leading to member frustration with the certificate process and hours of costly administration time.

## A MODERN APPROACH TO EVENT MANAGEMENT

The FPA was eager to use Jomablue and its Event Check-In, Lead Capture, Session Attendance Tracking, and Insights functionalities to address these challenges.

In previous years, attendees would wait in line to receive paper badges, then enter the event to attend workshops and earn their CPD credits. But with Jomablue Event Check-In, attendees received an e-ticket through email or text message, ensuring quick entry. Each member's e-ticket was scanned on arrival, and a Jomablue Smart Badge instantly printed out. No standing in line. No paper badges in plastic sleeves. No hassle.

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— PENE LOVETT,  
Chief Operating Officer

Additionally, Smart Badges helped the FPA team gain a complete real-time view into which sessions people attended. Using Session Attendance Tracking, Lovett and her team knew which workshops members were attending, when they entered, when they exited, and how many CPD credits they successfully completed. This data was instantly recorded, providing an accurate reflection of individual earned credits.

“We never had that data before,” Lovett says. “Now I have numbers I can look at. I can analyze it and see where every attendee went.”

The jump from paper sign-ins to verifiable data was transformative. Weeks of staff time was eliminated as the FPA significantly cut administration and management load for processing attendee data.

FPA members also reap the benefits of Jomablue integration efficiencies. By leveraging Session Attendance Tracking data, the FPA can now automatically generate CPD certificates through its information management software, allowing members to quickly and accurately see their CPD status online without having to contact the call center.

## **USING DATA TO EMPOWER BETTER DECISION-MAKING**

“As a membership association, our key metric is member engagement. How engaged are our members? Do they vote with their feet and renew every year? Are new members joining us?” says Lovett.

By partnering with Jomablue, the FPA is better able to deliver engaging experiences for its members by efficiently and reliably tracking their CPD credits.

Another crucial benefit? Providing more value to the sponsors and exhibitors that help subsidize the Professionals Congress. The FPA can now accurately

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report how many leads each exhibitor captured, what types of exhibitors attracted the most interest from members, and more.

FPA leadership no longer has to cross their fingers about tracking their event success. With Jomablue, accurate, trustworthy data is at their fingertips.

“The Jomablue team was so fantastic and helpful. They have a passion for events and they gave us new insights,” says Lovett.

The FPA is eager to apply these learnings to create even better events for its membership in the future.

“We want to be the event that everyone comes to,” says Lovett. “That’s why Jomablue is right for us: because they are the best in the market.”

*Jomablue is the leader in event intelligence, empowering top brands to transform event experiences into sales and marketing insights.*

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