

# Transform Brand Platform

September 2025

**transform.**

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*“Transform is a uniquely safe place with the freedom to **actually work together on profound transformation at a personal and business level**. That’s rare and so valuable. Transform should become the accepted safe platform for people around the world to work together to **actually dream up and deploy a whole new world that works better.**”*

# BUSINESS STRATEGY

**transform.**

# PY4 Transform Strategic Direction

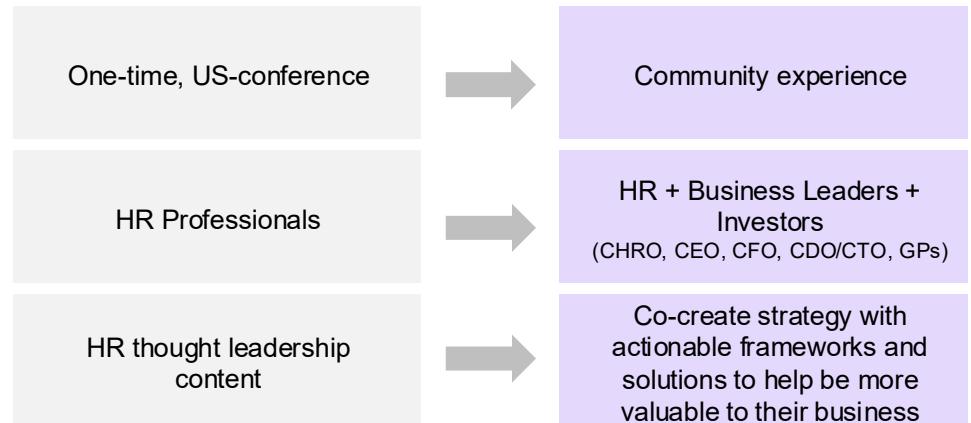
Business  
Goals

- Conference: \$9.807M (10k attendees at Conference 2030)

## Strategic Marketing Objectives

- Increase brand awareness and brand authority with sponsor targets, existing members and new audiences
- Drive revenue growth through sponsor renewals, sponsor growth and conference paid registration
- Drive incremental revenue through Exec Program
- Maintain chapter and ambassador engagement

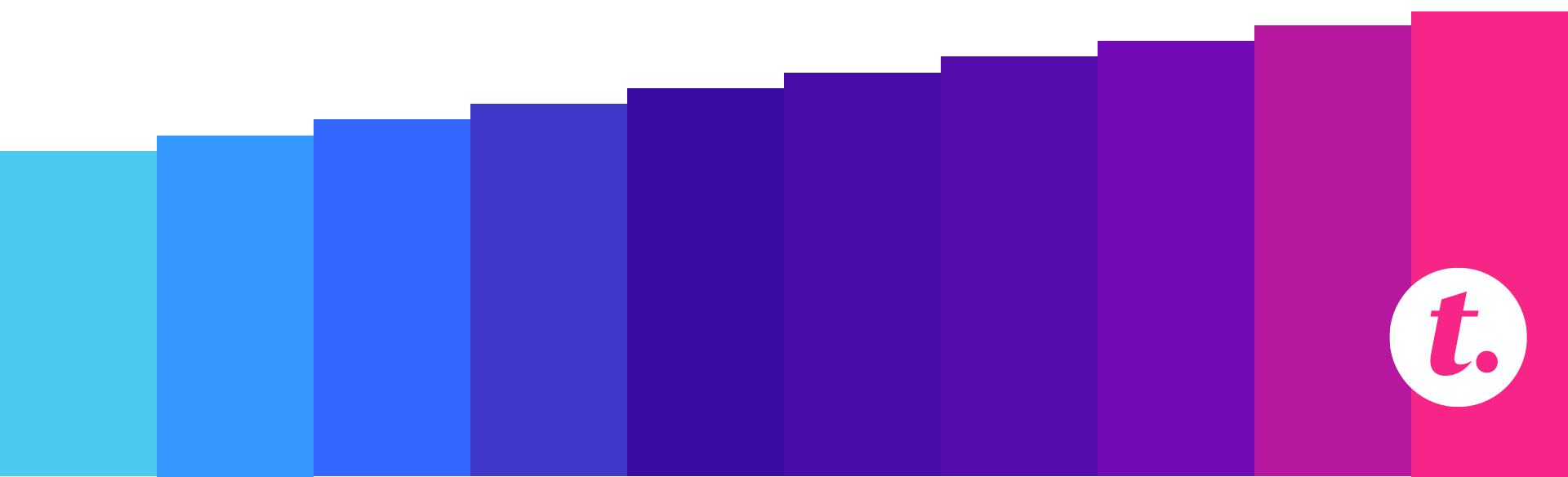
## Desired Perception Shifts



# BRAND POSITIONING

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# Brand: Competitive Landscape



# Summary

- ✓ **Transform competes across two distinct market categories:**
  - (1) large-scale conferences
  - (2) smaller-scale conferences (exec summits, TA/Benefits Shows)
- ✓ **Transform has unique position across categories:**
  - (a) SHRM competitor across categories
  - (b) Crowded landscape within categories
- ✓ **Transform only player with a focused investor – founder – executive ecosystem**

# Competitive Landscape // Summary

| Player                       | Target Audience                    | Target Segment                         | Top Use Case                 |
|------------------------------|------------------------------------|--|------------------------------|
| <b>Transform</b>             | HR execs, founders, investors      | Emerging → growth stage companies      | Year-round peer learning     |
| <b>C O N F E R E N C E S</b> |                                    |  |                              |
| <b>SHRM</b>                  | All HR professionals               | All segments                           | HR policy + certifications   |
| <b>UNLEASH</b>               | HR practitioners → HR execs        | Growth stage → mature global companies | Future of work content       |
| <b>HR Tech</b>               | HR practitioners → HR execs        | All segments                           | HR tech evaluations          |
| <b>C O M M U N I T I E S</b> |                                    |  |                              |
| <b>SHRM EN</b>               | HR execs                           | All segments                           | Executive roundtables        |
| <b>CPOHQ</b>                 | HR execs (limited one per company) | Growth stage companies (VC-backed)     | Confidential problem solving |
| <b>Conference Board</b>      | VP+                                | Mature global enterprises              | Executive councils           |
| <b>TroopHR</b>               | HR Managers → HR execs             | Emerging → growth stage companies      | Peer support groups          |

# Competitive Position

## Opportunities to stand out:

- Only ecosystem that connects investor – founder – executive ecosystem
- Distinct brand identity and market perception being “forward-looking” and “progressive” (alternate to SHRM)
- Combines strategic thinking AND practical application
- Leverage AI to provide curated “ecosystem insights” at regular cadence
- Counters the online fatigue driven by overwhelming number of virtual events; inability to create true connections virtually

## Pricing & Packaging:

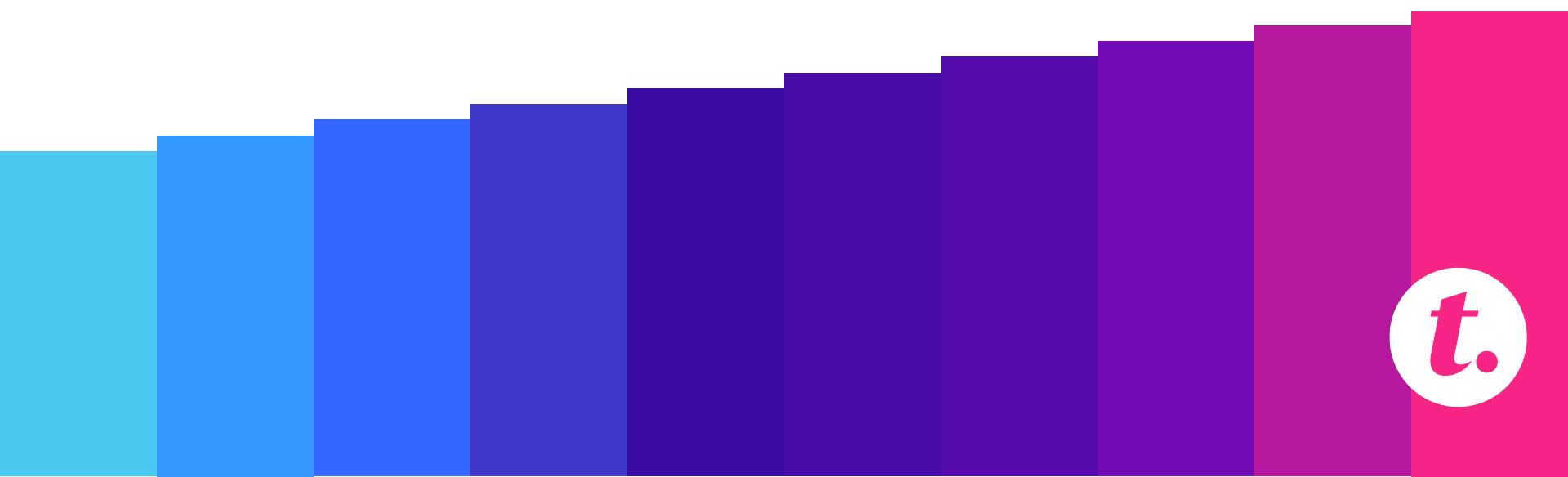
- **Bundle offer:** Exec seats + Conferences passes + Conference Digital Experience for single \$ with % discount when bundled.
- **Exec:** positioned well at current price, maintain exclusive invitation

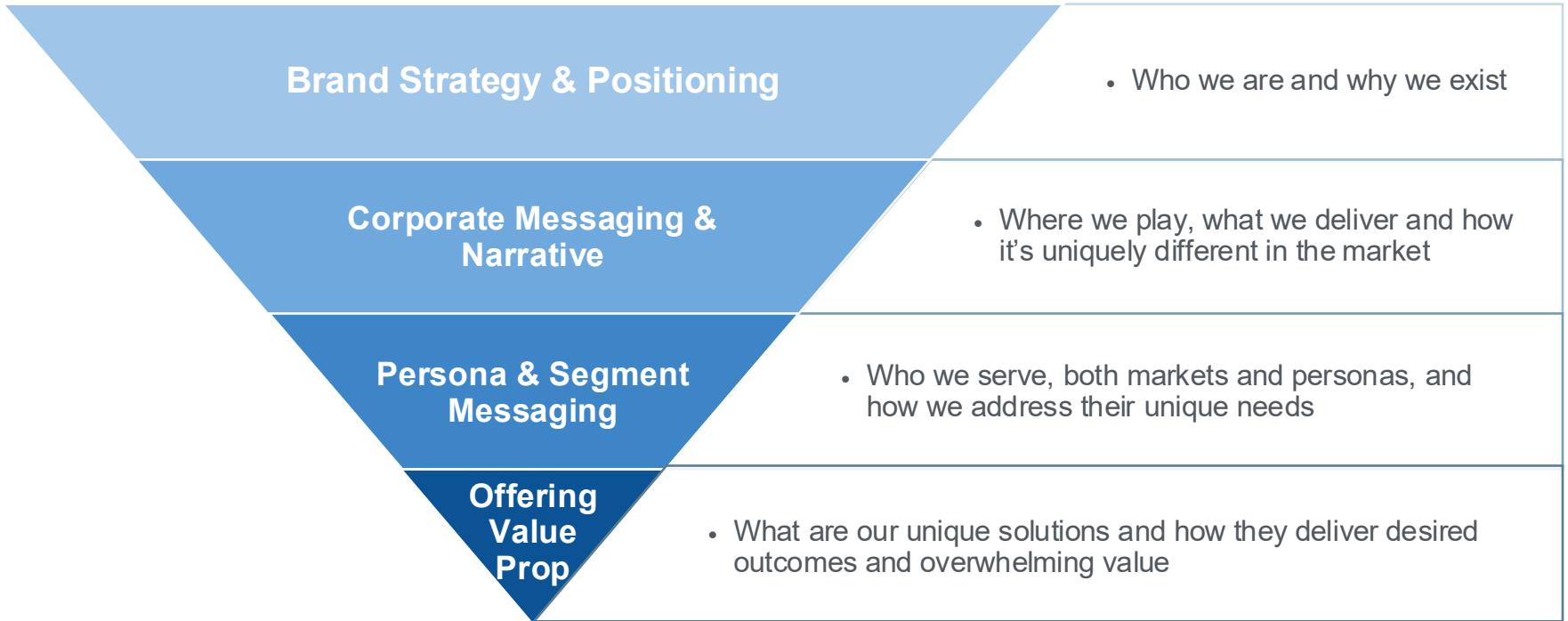
## Risks

### Budget pressure:

- HR functions are under financial pressure to operate efficiently with the same (or fewer headcount).
- Resources for networking and travel are being trimmed or cut.

# Positioning (internal)





# Brand Strategy & Positioning

|                       |  |
|-----------------------|--|
| <b>Mission:</b>       | What we do?  |
| <b>Vision:</b>        | Why we do what we do?  |
| <b>Customer:</b>      | Who are we for?  |
| <b>Brand promise:</b> | What is our brand's place in the market and in the mind of target audiences. |
| <b>Brand promise:</b> | What is the ultimate reward the customer gets from the brand?                |
| <b>Strategy:</b>      | How do we uniquely deliver on our vision?                                    |
| <b>Character:</b>     | What archetype will we tell our story through?                               |
| <b>Tag Line:</b>      | How will we communicate this to our customers?                               |

# Brand Strategy & Positioning

## Mission:

What we do?

We unite a global ecosystem of business leaders through a premier community experience that is shaping the future of people + work.

## Vision:

Why we do what we do?

People + work, thriving together

## Customer:

Who are we for?

Business leaders, investors and solution providers

## Brand position:

What is the Brand's place in the target market?

Transform is the global community experience for business leaders shaping the future of people + work

## Brand promise:

What is the ultimate reward?

Empowering leaders to shape a thriving, human-centered future of work

## Strategy:

How do we uniquely deliver on our vision?

We connect business leaders, help them discover people and tools, enable them to learn and apply insights, and create experiences that inspire them to reimagine the future of work.

## Character:

What archetype will we tell our story through?

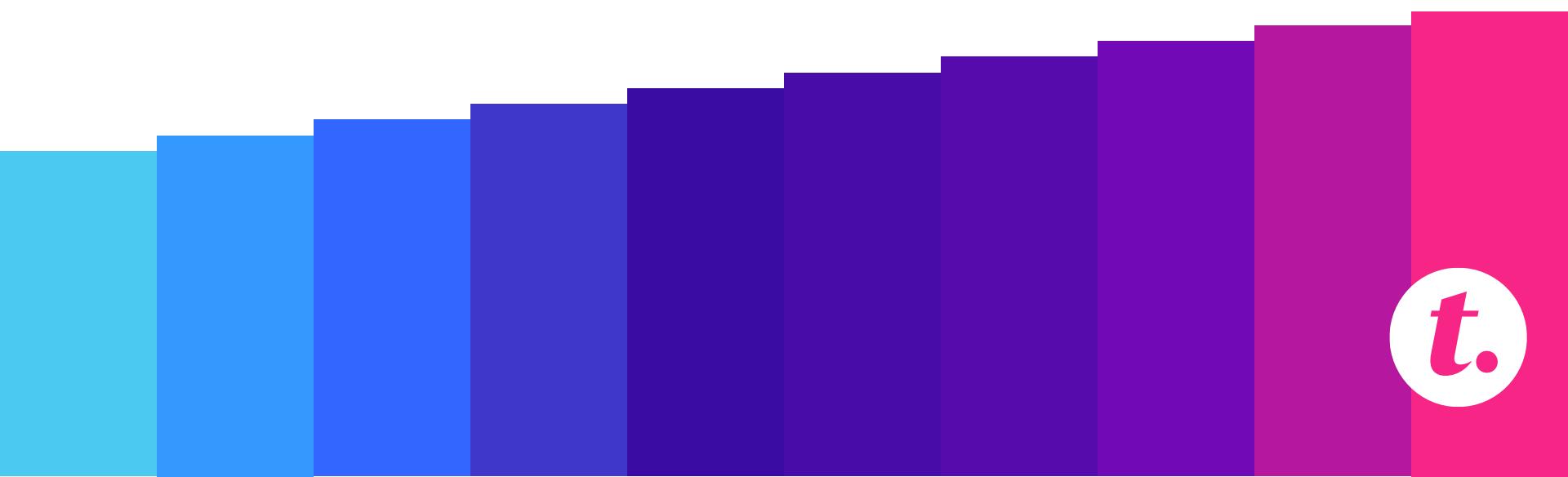
The Creator – Connected, Personal, Passionate, Future-Forward

## Tag Line:

How will we communicate this to our customers?

Join the Transformation of Work

# Brand Messaging (external)



# Brand Messaging House

## Brand Messaging

How it's uniquely different in the market

BRAND RELEVANCE: why our promise matters

BRAND PROMISE: what we deliver to our customers

BRAND ESSENTIALS: how we deliver on our promise

BRAND BENEFITS: what value the client ultimately receives

BRAND NARRATIVE: how we tell our story

# Brand Messaging House

BRAND RELEVANCE: why our promise matters

Today's business leaders are looking for strategic foresight, actionable frameworks, peer trust, and cross-functional collaboration. They don't want to "attend a show" or just "join another community" — they want insights, meaningful connection and solutions that help them be more valuable to their business.

BRAND PROMISE: what we deliver to our customers

We empower business leaders to shape a thriving, human-centered future of work

BRAND BENEFITS: what value the customer ultimately receives

- Experience meaningful learning through insights, case studies, and peer exchange
- Build trusted connections via curated events & year-round community engagement
- Drive business impact by applying ideas, tools, and actionable frameworks

BRAND ESSENTIALS: how we uniquely deliver on our promise

Event +  
Program  
Experiences

Forward-Thinking  
Business  
Perspectives

Ecosystem  
Connections

Trusted  
Human-centered  
Approach

BRAND NARRATIVE: how we tell our story

Transform is a premier community experience uniting an ecosystem of business leaders around a shared vision to profoundly transform the future of people + work...

# Brand essentials guide our in-market messaging, creating clarity on what we can uniquely and credibly deliver today

## AT TRANSFORM, WE DELIVER

### Event + Program Experiences

We build community through curated in-person gatherings and programming. This unique engagement ensures leaders stay connected, continuously learning, and building relationships that advance transformation.

### Forward-Thinking Business Perspectives

Constantly looking ahead, we provide practical insights, shared experiences from peers, and expert evaluations of tech + tools rooted in real-world situations. Leaders receive support to minimize risks, showcase ROI, and enhance the strategic business impact they contribute.

### Ecosystem Connections

We uniquely convene business leaders, founders, and investors; bridging roles, industries, and growth stages. This ecosystem accelerates innovation, fosters collaboration, and creates opportunities that no single conference or vendor can deliver on its own.

### Trusted Human-centered Approach

We believe people-first innovation drives business success. By shaping our content, experiences, and thought leadership through a human-centered perspective, we empower leaders to build thriving, human-centered, future-ready organizations.



SO OUR CUSTOMERS CAN (benefit message)

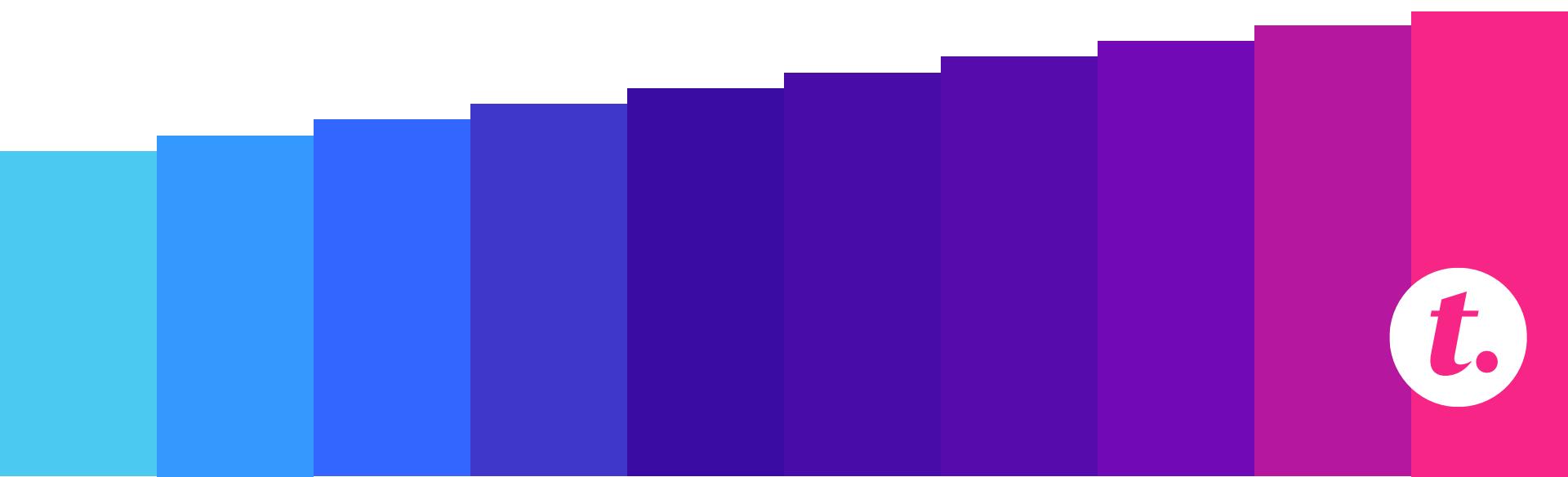
Stay Informed &  
Build Community

Increase Your Value to  
Your Business

Expand Influence &  
Impact

Place People at the  
Center

# Boilerplate Messaging



# Boiler Plate Messaging

- **Transform is a premier community experience**
- Transform is a premier community experience uniting an ecosystem of business leaders around a shared vision to profoundly transform the future of people + work.
- Transform brings together business leaders through curated in-person experiences, forward-thinking global perspectives, and exec programs. Our ecosystem, fuels continuously learning, fosters collaboration, and accelerates innovation.-We empower leaders to build community, drive business value, and shape a thriving, human-centered future of work.
- Transform is the premier community experience uniting business leaders across industries to shape the future of people and work. Through curated in-person gatherings, practical insights, and exec programs, we foster collaboration and accelerate innovation. Our trusted, human-centered approach ensures business leaders stay informed, expand their influence, and apply forward-thinking strategies that create measurable impact. Transform empowers organizations to build thriving, future-ready cultures—rooted in continuous learning, meaningful connection, and strategic transformation.

**Transform** is the *Premier Community Experience* for transforming the future of people + work.

Skills

Productivity

Community

Culture

Purpose

Wellness

Strategy

Leadership

Teams

Technology

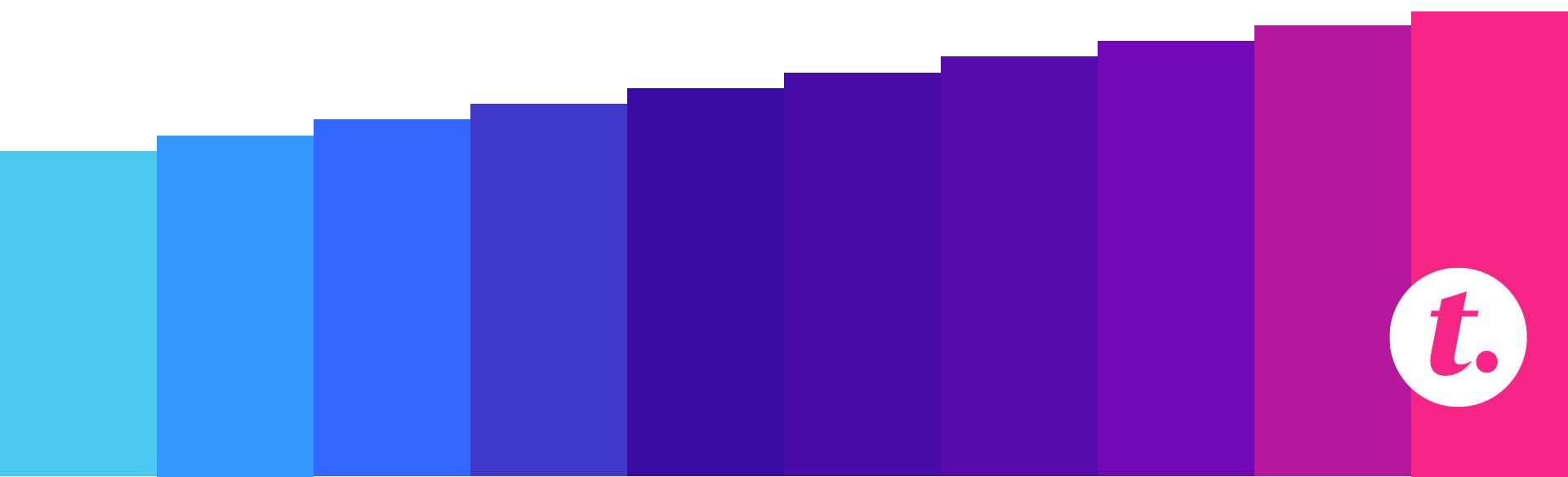
Systems

Performance

*Future of People.* + *Future of Work.*

Connecting at the intersection of where they thrive, *together*.

# Brand Architecture & Experience



Event + Program  
Experiences

Forward-Thinking  
Business Perspectives

Ecosystem  
Connections

Trusted  
Human-centered Approach

BRAND & BUSINESS

PREMIER COMMUNITY EXPERIENCE

OFFERING  
PILLARS

## GROUPS

Self-service Offering

## CONTENT

## EVENTS

## INFLUENCE

OFFERING  
CAPABILITIES

Global Chapters

Trends & Reports

Annual Conference

Distribution

Affinity Groups

User Generated

FastPass

Promotion

Private Groups

Thought Leadership

[TBD] Virtual Events

Access

MEMBERSHIPS

STANDARD MEMBERSHIP = FREE

CONFERENCE PRO MEMBERSHIP = INCLUDED WITH CONFERENCE PASS

EXECUTIVE MEMBERSHIP = PREMIUM

[TBD] CONFERENCE PRO MEMBERSHIP = PAID VIRTUAL CONFERENCE/EVENTS

**transform.** | Offering Experience

# transform.

The Premier Community Experience for Transforming The Future of People + Work.

MASTERBRAND  
LEVEL

BENEFITS  
LEVEL

MARKETING  
SITE &  
SIGNUP

MEMBER  
EXPERIENCE

**transform.**

CONFERENCE  
**2026**

**transform.**

DINNER SERIES, NYC

[www.Transform.Us](http://www.Transform.Us)

BECOME A MEMBER

[Members.Transform.Us](http://Members.Transform.Us)

*Go to our site to  
learn more and join ...*

*Conference attendees  
get access to our  
curated digital  
experience ...*

(Examples)

THINGS YOU CAN DO IN-PERSON:

THINGS YOU CAN DO ONLINE:

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GLOBAL CHAPTERS

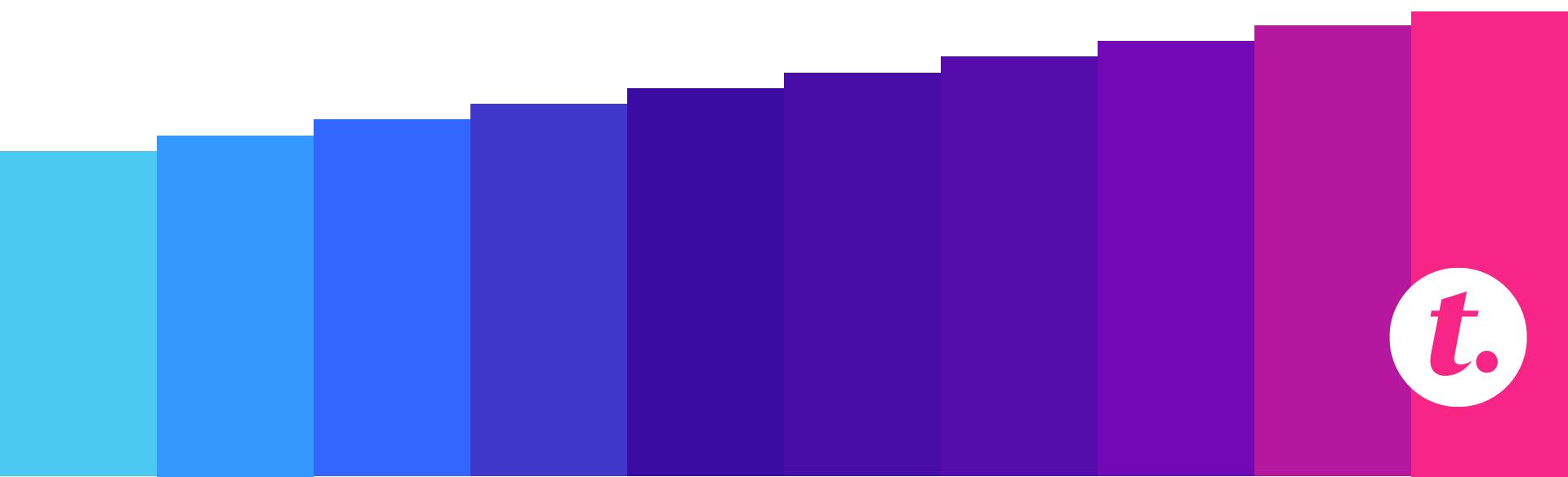
**transform.**

GLOBAL RESOURCES

# CONFERENCE POSITIONING

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# Conference Competitive Landscape



# Conference Competitive Set



WE'RE NOT JUST TALKING ABOUT THE FUTURE OF WORK, WE'RE SHAPING IT.

UNLEASH AMERICA is where the world's HR and business leaders come together to reimagine what's next—change the way organizations think about HR and innovation. Register for Unleash America March 17-19, 2024, in Las Vegas, NV. More info at [unleashamerica.com](#). See you there!

International Festival of HR— deal-making, product discovery, next-gen tech

- Exposure to global HR leaders (160+ countries).
- Big expo floor; high traffic, brand-building.
- Ability to launch or showcase tech products to a future-of-work focused audience

March 17 - 19 LV; \$2195; ~5k

For leaders wanting the latest HR tech and connecting to biz impact; Global; tech-forward; Bold messaging directed at Transform

Join the Leaders Driving Change

Discover the "Be the Change" moment at HR Tech 2024, where you'll learn how to transform HR services for tomorrow.

The must-attend HR tech expo with 400+ vendors

- "Largest HR buyer audience in one place"
- Clear ROI for vendors: direct lead-gen, demos, product adoption discussions.
- Strong press/media presence

Sept 16 - 18 LV; \$1895

Very tactical for HR leaders making buying decisions about vendors; solution showcase, trend-focused; PR; extension to investment firms; B2B partnership opps drive sponsor renewal

SHRM26

SHRM ANNUAL CONFERENCE & EXPO 2026 (SHRM26)

JULY 16-18, 2026  
ORLANDO, FL

REGISTER TODAY | ACCESS GROUP RATE

4 Days | 9 Content Tracks | 375+ Sessions | 400+ Sponsors | 28+ Events

"World's largest HR conference"

- Massive reach across all HR functions.
- Huge expo hall — lots of foot traffic and lead-gen.
- Exposure to practitioners at every career level.

Jun 16 - 19 Orlando; \$2395; ~20k

Broad/ll-levels HR; diverse (DEI compliance, talent, etc); career-development oriented; a bit of "something for everyone."



# Competitor Conferences // Market Sentiment

## SHRM

Established player

### Pros

- Incumbent market leader
- “Credits” attendance driver
- 20k+ attendees

### Cons

- Skepticism on ROI
- Premium cost
- Overwhelming scale

## Unleash

Up-and-coming player

### Pros

- “Big-name” speakers
- Paris + Vegas flagship events
- 100+ country representation

### Cons

- Content feels “generalized”
- Tiered access limits experience for attendees and sponsors

## HR Tech

Vendor-first player

### Pros

- Largest HR tech ecosystem
- Curated to “buyers”
- 500+ exhibitors

### Cons

- Vendor-forward content
- Overwhelming expo
- “AI-hype” saturation

# Conference Positioning

2026

## *Assumptions and Implications for 2026:*

1. *Programming will have a committed focus on:* 1. AI,  
2. CHRO and their C-Suite collaborations.
2. *We can drive attendance from across C-Suite:  
CTO/CDO/CFO/CEO*

# 2026 Conference Positioning

## Transform Brand

*Transform is a premier community experience uniting an ecosystem of business leaders around a shared vision to profoundly transform the future of people + work*

## Transform 2026 Conference

### *Lead the Transformation in the Age of AI*

*At Transform 2026, the world's most forward-thinking leaders unite to reimagine the future of people + work.*

The Transform Conference is where business leaders **reimagine the world of work in the age of AI**. Unlike transactional expos or diluted mega-events, Transform is a curated community experience where business leaders, investors, and solution providers come together to explore how to adopt AI responsibly, scale through innovation, and keep humanity at the center of work. More than a conference, Transform is a movement... creating community connection, meaningful dialogue and learning, and profound impact on the future of work.

### *Why it works*

- **Brand (evergreen)**... Positions Transform as the authentic community experience — timeless, differentiated from Gartner's data, UNLEASH's tech, HR Tech's tools, and SHRM's sprawl.
- **Conference (timely)**... Leans into AI as the hot issue, but frames it through human-centered navigation, Transform's unique differentiator.
- **Ecosystem of Business Leader**... establishes Transform as the premier event to connect with an ecosystem of business leaders and C-level roles (including your own).

# Conference – Persona Positioning

## Transform Brand

*Transform is the premier community experience for business leaders shaping the future of people + work*

## Transform 2026 Conference

*Where business leaders shape the future of work*

*keeping humanity at the center in the age of AI.*

### CHRO / PEOPLE LEADERS

### HR/TA Teams (non-CHRO)

### CTO/CDO

#### **Value Prop + Benefit:**

*Lead the workforce transformation. Transform empowers CHROs to move beyond functional HR innovation and elevate into business strategy while strengthening culture, trust, and engagement to drive business outcomes*

#### **Proof Point:**

Cross-functional dialogue with business leaders, insights from innovators, and case studies that show how to strengthen culture & deliver measurable business impact.

#### **Primary Need Addressed:**

Redefine talent strategy, skills, and culture in an AI-driven workforce — ensuring innovation doesn't come at the expense of trust and engagement.

#### **Value Prop + Benefit:**

*Transform equips Talent leaders with the insights, tools, and peer connections to operationalize workforce transformation. It helps teams translate strategy into practice to elevate hiring, development, and retention outcomes.*

#### **Proof Point:**

Hands-on sessions, practitioner case studies, and best-practice exchanges focused on implementing next-generation talent strategies.

#### **Primary Need Addressed:**

Practical guidance on *how* to apply new technologies and people analytics to attract, develop, and retain talent, while keeping human connection and culture at the core.

#### **Value Prop + Benefit:**

*Transform provides CTO/CDOs with direct access to HR leaders and real-world use cases to ensure AI and data strategies align with workforce trust, ethics, & adoption.*

#### **Proof Point:**

Sessions that bridge HR + tech leadership, covering AI ethics, workforce readiness, and change management frameworks.

#### **Primary Need Addressed:**

Business alignment: "How do I implement AI solutions that HR and employees actually adopt and trust?"

# Conference – Persona Positioning (cont.)

## Transform Brand

*Transform is the premier community experience for business leaders shaping the future of people + work*

### Transform 2026 Conference

*Where business leaders shape the future of work — keeping humanity at the center in the age of AI.*

## INVESTORS

### Value Prop + Benefit:

*Transform connects investors with visionary leaders shaping the future of work and responsible AI — providing unique visibility into emerging technologies, market trends, and companies driving human-centered innovation.*

### Proof Point:

Curated access to executive discussions, startup showcases, and case studies highlighting scalable solutions at the intersection of AI and workforce transformation.

### Primary Need Addressed:

Identify high-potential investment opportunities and partnerships aligned with responsible AI adoption, workforce transformation, and long-term business value creation.

## SPONSORS

### Value Prop + Benefit:

*Transform gives sponsors an intimate, curated environment to build authentic relationships with senior HR and business decision-makers actively shaping AI adoption and future-of-work strategy.*

### Proof Point:

4000+ business leaders from 50+ countries; curated networking dinners, year-round community touchpoints.

### Primary Need Addressed:

ROI and influence: “How do I get in front of real buyers and position my brand as a trusted partner in human-centered AI?”

# Sponsor Messaging: General

*Transform 2026 conference gives sponsors an intimate, curated environment to build authentic relationships with senior HR and business decision-makers actively shaping AI adoption and the future of work.*

- **Reach the Right Buyers:** Engage directly with CHROs, senior decision-makers, and board influencers who control budgets and strategy.
- **Break Through the Noise:** Premium sponsor activations cut through expo clutter and spotlight your brand where it matters.
- **Be Seen as a Strategic Ally:** Align with the Transform community shaping the now + next of work and earn credibility as a trusted partner.
- **Extend Impact Year-Round:** Tap into the global Transform ecosystem for year-round visibility, executive access, and lasting impact on pipeline and partnerships

## *Why it works:*

- **Vs. Unleash America...** Unleash appeals to lower-level attendees, so vendors struggle to get exposure to real influences and buyers and must compete with large industry incumbents. Transform, however, positions vendors as strategic partners, providing an environment where decision-makers that come to learn, and offering a platform for innovative companies to be recognized.
- **Vs. HR Tech...** HR Tech has become a channel partner focused event, void of true buyers and the VC community influencers. Transform attracts CxO and VP level attendees—in addition to their teams. Sponsors influence buyers upstream at the C-team and boardroom level, not just downstream in procurement.

# Sponsor Messaging: For AI-Company Sponsors

*In a crowded and confusing AI landscape, leaders come to Transform to cut through the noise and learn from the source — positioning sponsors as the trusted partners leading the way. It's an intimate and curated environment to build authentic relationships with senior HR and business decision-makers actively shaping AI adoption and the future of work.*

- **Reach the Right Buyers:** Engage directly with CHROs, senior decision-makers, and board influencers who are evaluating and deploying AI to transform their organizations.
- **Break Through the Noise:** Premium sponsor activations cut through expo clutter and spotlight your AI solutions with buyers seeking trusted, proven partners.
- **Be the Strategic Voice on AI:** With four years of dedicated AI programming from the AI@Work series to webinars and mainstage content, Transform is where leaders come to cut through the hype and learn what's next. Sponsors are seen as the trusted partners leading this change.
- **A Year-Round Strategic Ally:** Align with the Transform community shaping the responsible adoption of AI, gaining lasting credibility and visibility with executives and thought leaders driving the future of work.

## *Why it works:*

- **Directly Taps Into Market Urgency...** AI is the defining disruption in HR and work tech right now. Framing Transform as the place to cut through confusion positions sponsors in front of executives actively seeking clarity and trusted solutions
- **Elevates Sponsors Above the Vendor Pack...** By emphasizing Transform's four-year track record in AI programming, sponsors aren't just another booth at an expo — they're aligned with the leaders and voices shaping responsible adoption
- **Matches Buyer Pain Points...** CHROs and business leaders are overwhelmed by hype and "AI dizziness." Messaging that highlights Transform as the source for practical, business-focused AI learning speaks directly to their need, making engagement feel valuable, not salesy.
- **Expands Long-Term Association with AI Leadership...** Sponsors aren't just attached to a single event, they're positioned as year-round allies in AI transformation. That extended visibility keeps their brand tied to AI credibility well past the conference, improving ROI and conversion.

