

**Consortium Development Committee Meeting
Thursday, Dec. 31**

Agenda

1) Review items from 12/23 call

- Proposing that we target Paylocity and Paycor as preferred partners- **is this for launch? Exactly how would this work? I think this needs to happen after launch**
- Why work with TCG?
- Sales training for internal and external wholesalers- **need to put some structure around this before we can say it.**

2) Review of Committee's Ideas around Why work with TCG?

3) Review of Committee's ideas around Challenges we will face and how to respond

4) Create Launch Plan

- Press release- to who?
- Targeted emails to RKs, FAs and B/Ds
- Calls to COIs to set up appointments- RK and FAs- we'll need to decide what we want to say for each of the audiences
- Speaking at RK sales meetings?
- Ad in Plan Advisor magazine or banner ad on website?
- Ad in Plan Sponsor magazine?

5) Report back to Board on Monday's Call

- Strategy
- CIOs we'll focus on for launch
- Metrics needed from the Board
- Primary and secondary territories needed from the Board- to message geographical coverage
- Launch Plan

- Why work with THC-review what we have and ask for ideas
- Challenges- review what we have and ask for ideas