

## 2/3/2021 Consortium Development Call

Attendees: Bob Chin, Kim Hansz, Pat Shelton, Ann Slotwinski, Debbie Zimmer

### Minutes

#### 1) Create Launch Plan

##### "One Pager"- Ann

- Messaging from Brian
- Other messaging outside of what Brian has provided
- Challenging Questions
- Will have draft for review by Feb. 15
- Once committee has reviewed, will have ECO review
- Ann is creating a timeline for this that will outline tasks and deadlines
- It will be very important that all feedback is provided in a timely manner.

##### Website Content- ECO

- This committee will give Peter the messaging from Brian
- The ECO will be responsible for the rest of the website

##### Press Release- Pat and Ann

- Brian creating
- Pat will talk to Rick Miggs to pick his brain about our approach
- Give 401K Specialists an "exclusive"
- Rick Miggs- Pat will call. He distribute the press release to the general public.
- We need to identify our A, B and C audiences. A= who we want to talk to, B= who we maybe want to talk to and C= who we send info to.
- Ann and Pat will create a plan with a timeline that will be ready for review by this committee and the ECO on Feb. 22

##### Interviews- Ann and ECO

- Messaging – we will use the "one-pager"
- All requests for interviews will be funneled through Ann
- Ann will set up any interview requests to include Ann and at least one ECO member
- Ann and the ECO need to be really well prepared

##### Media Kit- Debbie

- The media kit will be used by members if they get a request for information
- It will also be our source for attendance at Industry conferences, especially if we have a booth.
- What goes into the media kit?
  - a. Press releases
  - b. Brochures
  - c. "One-Pager"

- d. Cyber Security Minimum Standards
- e. And more.....
  - Debbie and Ann will work with Peter to find a place to put this on the member's portion of the website.

### **Emails to COIs- Bob**

#### Who? - Recordkeepers

- Primary audience- Head of TPA, Sales and Ops
- Secondary- TPA managers, wholesalers and internal desks

#### When?

- Week after press release

#### What?

- Content- **Bob and Ann**
- In general- All emails will include an introduction to TCG with link to press release, brochure and website
- Head of TPA- introduction plus asks them to coordinate a Zoom meeting with TCG and themselves, the Head of Sales and Head of Ops.
- Heads of Sales and Ops- introduction plus tells them Head of TPA will be coordinating a call with them and TCG
- TPA managers, Wholesalers and Internals- introduction
- Bob will create a draft email
- Ann will send out all email and quarterback any requests for calls, information etc.

#### Contact Info- Bob

- Ann will give Bob a list of the RKs we need to reach out to
- Bob will pull together all the contract info for Heads of TPA, Sales and Ops, TPA Managers, Wholesalers and Internals at the RKs.
- Ask TCG members first
- TPA managers for the various RKs should be able to provide that info. Tell them you want to share some good news.

### **Other COIs**

#### Edward Jones

- They already have a preferred TPA program
- Reach out to John Davis or Pat's first boss who now runs the TPA part of EJ
- Set up a zoom meeting to intro TCG

#### Merrill Lynch and Morgan Stanley

- Bob has a lot of business with both of these firms
- He will reach out to them to introduce them to TCG

#### Top FAs

- Create an email the members can use to send to their top FAs

### T. Rowe

- Lynn Roy has been hired as Head of TPA
- We can help Lynn and she can help us.

### ERISA Attorneys

### CPAs

### AICPA

### SHRM

## **Agenda**

### **2) Create Launch Plan**

#### “One Pager”- Ann

- Messaging
- Challenging Questions
- Will have draft for review by Feb. 15
- Once committee has reviewed, will have ECO review

#### Website Content- Let's Discuss

#### Press Release- Pat and Ann

- Brian creating
- Who do we send it to?
- Give 401K Specialists an “exclusive”
- Rick Miggs- Pat will call. Will he distribute the press release to the general public?
- Clearview?

#### Interviews- Ann and ECO

- Messaging
- Ann will set up any interview requests to include Ann and at least one ECO member

#### Media Kit- Debbie

- What goes in it?
- Distribute to Board for local use
- Who else?

#### **Emails to COIs- Bob**

##### Who?

- Content- **Bob and Ann**
- RKS- Head of TPA, sales, ops
- Prioritize by who is Friendly

- Who else?
- Contact Info

#### When?

- Week after press release or sooner?

#### What?

- Introduction to TCG with link to brochure, website- we need to flesh this out
- Ask for a zoom call- ECO and Ann attend?

#### Marketing Plan- Kim

#### Ads- After Launch

- Plan Sponsor magazine
- Plan Advisor magazine