

6/1 Consortium Development Call

Target Markets

- We had various discussions about our target markets and how to classify them. We decided that we would include any entity where we currently, or plan to, get referrals from. Here is where we landed:
- Traditional: RKs, DCIOs, B/Ds, Payroll;; Cos
- Trusted Advisors: RIAs, Registered Reps, CPAs
- Associations: AICPA, SHRM, Chamber of Commerce, small business associations. Our goals will be to create B to B relationships with Plan Sponsors and this will be a new channel we will explore.

Marketing Strategies

Event Promotions can be classified as:

- Industry Conferences- NAPA, SHRM, AICPA, small business association conferences
- Workshops, Webinars and Meetings- for example- RKs (sales, internals, Ops and RMs) AND National ones such as Ari Rosenbaum's

Corporate Social Responsibility

- Kim is doing research into the best charity for us to contribute to- she is not a fan of WWF
- She will present her finding to us once she has done her research
- We should explore the possibility of TCH giving back to the financial services community- perhaps training young people.

Content Marketing

- Everything should be digital (although we will need some print pieces for conferences etc.)

Content Distribution

- This is our Social media Strategy
- We decided to start with one TCG article a month that we will hire the writer to create. Each month, one firm will come up with a topic and work with the writer to create. The writer costs \$50 per hour and we estimate she will need 4 hours per article. Ann to confirm the process with Peter
- Once we get that going, we can look at the collateral that TCG members have. It will be a lot of work to sift through that to determine what should be branded TCG and published. We also need to create the process to get that done. The committee will share this responsibility

So, there are 3 steps to this:

1. Written article each month

2. Gather TCG collateral
3. Review and inventory TCG collateral

NOTE: Pat has hired a new business development guy who is familiar with the process to get approval for CE credits. This is great news for us. We can develop CE approved presentations and speak at Industry conferences or do targeted webcasts to audiences.

Next Steps

1. Create tactics to support the strategies
2. Think about a Sales Plan- what's the next step after we talk to all RKs sales teams? Can we look at our sales for 2021 and make a commitment to increase them by X% for each RK? Is this a topic for our annual meeting?