

7/20 Consortium Development Call Minutes

1) Review the Marketing Plan

Overall Comments

- The document is very “wordy”. Pat will pare it down so that it is more concise and easier to read. We will, however, maintain a copy of the original full document for our records.
- Debbie has already sent a revised version of the plan based on our 7/20 discussion. As such, these minutes will contain any other comments that need to be incorporated into the plan and other decisions that were made.

Mission Statement

- Change the first sentence to read ‘Maximizing the impact of TCG for member firms leading to improved business development, automation, and best practices for a better bottom line.’

SWOT Analysis

Opportunities

- Add a bullet point- Potential to lower insurance premiums based on TCG’s minimum Cyber Security standards which are being developed

Marketing Objectives and Performance

- Leave this portion as is.

Marketing Strategies

- Add a bullet point that specifically spells out TC Presentation to Record Keepers Leadership, Sales teams, Internals and Relationship Managers

Content Distribution Plan

- Under Categories, split out TPA Best Practices from Technical and Education
- Create a new bullet point that is General Business, TPA Best Practices and Thought Leadership.

Focus for the Next Six Months

- Need a more formal way of documenting this
- Need to include conferences, articles, NAPA Partner benefits, Plan Advisor ads, speaking engagements, CPA CPE
- Will create a monthly marketing template that includes all activities

- Can share with TCG to show we're adding value.
- Debbie will send a template she has
- Ann will start completing the template
- As we put the monthly plans together, we must be mindful that some of the things we will want to do will cost TCG i.e., buying the booth, hiring the writer. Etc., Need to have a column on our monthly plan that shows any TCG costs associated with an activity
- August article will be on After Tax and Jordan is the author.
- Pat's TPA Alpha will be a white paper since it will be a longer piece with more information
- Dec article could be on the importance of accurate census data
- Need to make a list of article topics and categorize them into technical, thought leadership, general business, best practices, educational, plan design, CPAs. Ann will do draft of this for our next call.

Next Call

- Review list of articles topics and how they should be categorized
- More discussion on CPA Strategy
- How should the members leverage the articles?