Cerrado Group Annual Meeting

August 21, 2023

Hotel Teatro

Denver, CO

**Maximum IMPACT Partners Participants:**

Ami Tully

##### Cerrado Group Strategic Initiatives Agenda:

9:15 AM - 2:00 PM

1. **Member Interviews on 3 Priority Initiatives – Results**

*All members participated in 1:1 discussions with Ami Tully and Bill Hicks. Let’s review the results of those discussions to create a path for our work today.*

1. **Technology** -Automation

2. **Branding** - "Why Cerrado matters to you" stories need to be developed for a variety of audiences:

* Create Brand Standards for Cerrado logo, member website link
* Create "Why Cerrado" member website messaging
* Why Cerrado -staff messaging
* Why Cerrado -advisor messaging
* Why Cerrado -record keeper sales team messaging and outreach
* Why Cerrado -CPA messaging
* Cerrado blog/newsletter
* Social media strategy

3. **New products and services** - Payroll integration or white label trust services (Penchecks)

1. **Reset the Deck on Resources**

*Members will rethink how to share services, how to fund the general functions of the Cerrado Group and also how to fund specific initiatives going forward. Time vs. money.*

* Creating sources to fund initiatives
  + Membership dues funds the office of the ED; staff, annual meeting, operations;
  + Initiative funding sources
    - Member funding – sliding scale based on size of firm
    - Sponsorship funding – managed by ED

1. **Process Improvement**

*Where do members struggle with processes? Can we improve a process without sharing an admin platform? Can we incubate a solution in one member firm and then integrate that solution to other firms one at a time? What are the processes to be prioritized? Let’s discuss.*

* Group exercise on member resources: Template provided for resources available
* Group exercise on outside services: Who do you use for that? Star rating.

1. **API Capabilities – Ann Slotwinski: Current State of API Efforts**
2. **Presentation for Cascade Innovations**

*Technology solutions created for and by TPAs are not common. Joe Burt has a solution he has developed and used in his practice. Is this a solution to technology issues for some TCG members? Ami will facilitate a 20-minute Q&A with Joe.*

* Problem Identified:
* Competitive landscape:
* Solution created:
* Current Capabilities:  What is working right now?
* What is next?
* Cost to create MVP; anticipated cost of next level viable product
* Expected deliverables:  what will be delivered for that cost?  When will that be delivered?

1. **Conclusions**

* What did we decide today?
* Resources identified.
* Priorities identified.