**The Cerrado Group – Branding Committee**

Leslie O’Bryan – Benefits Administrators

Forrest Knowles - QRPS

Trina Gross -Acuff

Bob Carroll - MAP

**Agenda/Scope of Work**

* + What is the goal? Clearly outline who we are to the market.
  + Understand value proposition - FA and Wholesalers
    - More ideas than marketing pieces (video, campaign, social media to grab attention)
      * Various media types
      * Staff Marketing Piece – explain to TCG member firm employees what is TCG.
      * Advisor Marketing Piece – explain to Advisors what benefits working with TCG member firm
      * Wholesaler Marketing Piece – explain to Recordkeeping Wholesalers what benefits working with TCG member firm.
      * Metrics handout update annually to distribute (Cerrado #2 in Empower)
      * 1 piece of organic content per month for social media
  + PR Package for TCG – what content does TCG want (electronic)
    - Oasic example – packet to send to broker/dealers prior to introductory calls “the WOW”
  + Press Release Campaign – what content does TCG want (electronic)
    - Spark Membership
  + Next Steps

**PR Firms to RFP So Far**

1. **GSM Marketing**

4600 Touchton Road East, Suite 1150, Jacksonville, FL 32246

[www.gsm.marketing](http://www.gsm.marketing)

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Discussion

* We decided that there are three areas that need Marketing and Branding support- Industry ( FAs, B/Ds, RKs
* and DCIOs; a review of what the members already have to leverage what already exists; materials targeting the TCG employees to help them understand TCG better.
* We decided that we will focus on the Industry first
* Ann will ask the TCG members who they currently use for the Marketing- what exactly do they do for you, are you happy with them and why, are you willing to switch if we choose one entity to do work for all of TCG. . In addition to this, Ann suggests we also include Chris Chaia, Onwards Consulting, C: 860-930-4230, E: [christinechaia@outlook.com](mailto:christinechaia@outlook.com). Chris weas AVP of Marketing for Mass Multaul Retirement for 10 years, and also led the Retirement Marketing area for Ascensus for 4 years.
* Choosing one entity should give us buying power. Will request this info be submitted by the end of the year.
* If we agree to choose one entity to do all our work, the members can use some or all of their existing marketing budget to help pay for the Consultant.
* Ann and Leslie will create an RFP that we will send to all the various entities. This will be reviewed by the rest of the committee prior to finalization.
* We need a consultant who can interview us and do most of the content creation. We also need a “hook”- something to set us apart from all the other TPAs out there.
* This committee will review the RFPs and select the top 3.
* This committee will interview the top 3 and make a recommendation to the members.
* Ideas we talked about are: podcasts, Secure 2.0 tax credit calculators, compilation of data to share industry trends.

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