**4-24-24 Products and Services Minutes**

**Employee Survey**

1. Ann’s Discussion with Business Health

* Reviewed the project overview.
* Need to create a rating for each report- Pass/Fail, Excellent/Good/Improvement needed etc.
* Will have quantitative questions and a space for qualitative comments.
* Can create the survey in such a way that if a staff member doesn’t work on a particular topic, they can indicate N/A
* Think about limiting the number of RKs included in the survey- maybe top 5.
* Terminology used mist be consistent across all RKs surveyed.
* Must have top-down support from the owners to encourage participation.
* They will come on a committee call to hep us build this- at no charge to us.
* Can give is a quote once we have the call with them but need to figure out the topics and questions first.
* No more than 6 topics
* If we hire them- they do the heavy lifting
* Have noted the dates for the annual meeting.
* Suggested we have the survey done and the results compiled, and they can report back at the meeting- not sure we can pull that off.

1. Next Steps

* Compile topics and questions.
* Let’s talk about how we do this.
* Staff and RKs
* Top 6 RKs- JH, Empower, American Funds, Principal, Voya, Transamerica

Discussion

* Even though BH thinks they can do one big survey with all topics, we may have to do separate surveys by topic as some firms have separate teams for each function. This can be determined when we talk to BH.
* Rank the RKs by # of plans and # of participants: Plans= American Funds, JH, Empower, Principal, Voya and Nationwide. Participants= JH, Empower, American Funds, Principal, Voya, and Transamerica
* We will compile our list of topics and see if there are any similarities wth what the RKs would like surveyed.
* We are thinking that Force-outs, RMDs and Loans and Distributions is our short list, but this must be confirmed.
* How do we get a good response from our employees- review the purpose of the survey with the staff, we will create positioning wording for TCG to use
* Once the results are in, we will review within the staff prior to the report back to the RKs to get more color commentary.
* Allow some staff to sit in on the call where we report back to each RK.
* We will make every effort to get approval, deploy the survey and have the results ready for review at our annual meeting. We want to set a good example for the other committees on how to get work done.
* Our next call is on May 8th at 11am ET. The one after that will be on May 24 at 11amET.