**8-14-24 Products and Services**

1. **How to Deploy the Reports with the Record Keepers**
* Ann will find out who is appropriate in the firm to include in this
* We want it to be decision makers in Ops or Product- not only the TPA rep
* Should we have a positioning call first before we send it? Or we position it in the email
* Will send the report and offer to have a call
* Ann will ask BH how much it will cost for them to deliver the results virtually
* Once completed we will ask the RKs if they found it valuable
1. **Need for Confidentiality**
* Must stress to TCG that all results must remain confidential
* Do not say who we piloted this with
* Do not tell any anything about their competitors results