**9-11-24 Products and Services Minutes**

1. **Review our discussion at the Annual Meeting and discuss next steps**

**Employee Survey**

* Rod Bertino shared the combined results of the Employee Survey
* The group was impressed with the results
* We need to ensure that we thank and acknowledge the employees who participated
* We will share with the employees how we will be deploying the RK reports
* Share the information on Force-outs with Pencheks
* Ensure they know that we were surveying on JH Signature and American Funds RK Direct
* Still need to confirm how we will deploy: Send to TPA person or to Decision Maker? Offer a call with BH free of charge?

Going Forward Ideas

* Rebrand as a TCG Research Initiative
* Annual Survey
* Charge to participate as part of sponsorship
* Publish the summary results- free of charge
* Pay for the detailed results for a RK- only their results with the other RKs redacted?
* Discounted rate if the RK participated in the survey.
* Charge for republishing rights

**Items for Discussion**

* How do we deploy?
* Send the reports to the RKs. Who do we send them to?
* Offer debrief with BH- need leadership on this call
* Ask for questions from RKs prior to call with BH- questions on rankings and employee comments
* Need to get feedback from RKs on whether this was valuable. What did they like, what could be done better, would they be willing to pay for this going forward.
* Let’s finalize this before we look at next year.

**Discussion**

* Ann will send the report to her TPA contact at the RK
* Report will contain everything but the remarks. The reason for this is we want to make them want to have the debrief call so they can see the remarks which will inform the reason behind the rankings
* Will offer a complimentary call with BH and the Products and Services team to debrief. The debrief will include a new report that contains the comments.
* We ask that decision makers from Ops/Service attend the debrief as we hope that the results can influence change
* We will put together a team of specialists who will sit on the call and can respond to questions about the remarks
* Will ask BH to put a disclaimer on the reports that says that this is not for public use. What we want to do is make sure they don’t publish the report or parts of it publicly.
* At the end of the call we will ask them if they have found this valuable, would they be willing to pay for this if we do it on an annual basis
* Ann will put together a list of topics that the RKS suggested already
* We will do a webinar to report back to the participants how we deployed this to the RKs, what their reactions and comments were and to thank them.
* Will also ask the TCG members to thank their employees who participated however they see fit