



MDRT Learning Platform

FAQ's – Frequently Asked Questions

How do I log into the MDRT Learning Platform?

- 1.) Go to: <https://MDRTMASTERY.sumtotal.host>
- 2.) Please enter your MDRT Aptify credentials to gain access to the system.

Login to MDRT

Not sure of your login information?
[Try Member Look Up](#)

Don't have an account yet?
[Create an Account](#)

Use Email/Username/MDRT ID

Email/Username/MDRT ID*

Password*

Keep me logged in

Log in

Trouble logging in? [Reset Password](#)

*Please note that you will **not** check the keep me signed in checkbox and will always need to log out after each session.

*You may **change your password** after you have successfully logged on to the system.


*If you **forgot your password**, or have trouble logging in click [Reset Password](#)


> You will need to provide your email address


> Click Send verification code

OR

Use social media to log in

 Log in with Google

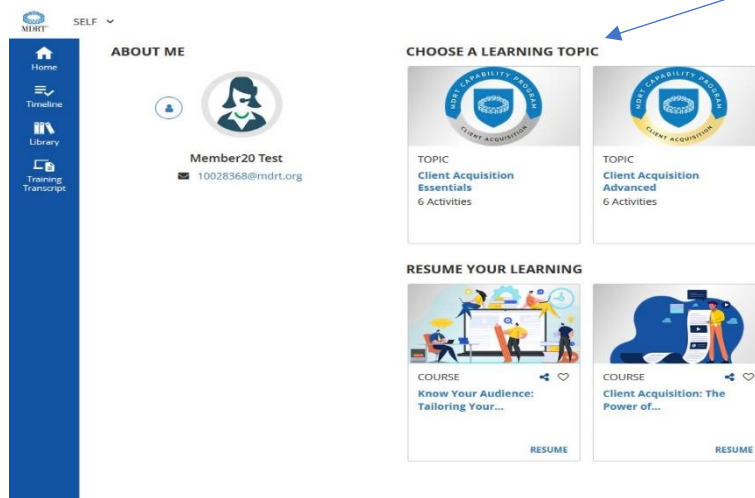
 Log in with LinkedIn

 Log in with Facebook

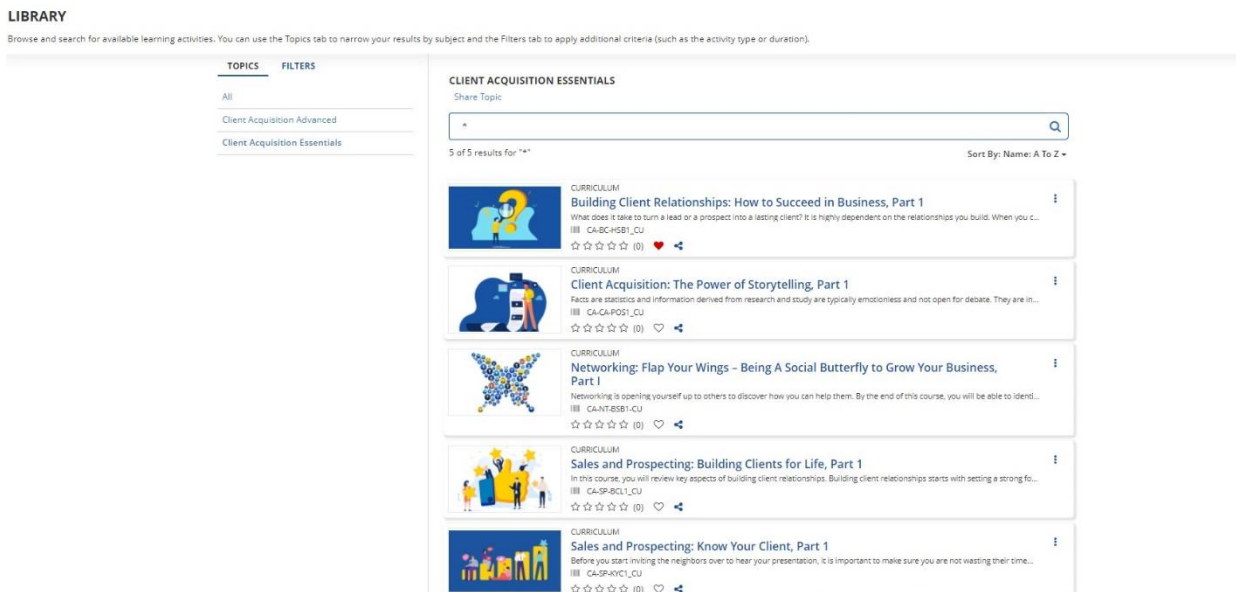


What do I do once I gain access to the Learning Platform?

1.) Once you have gained access to the Learning Platform you may begin your learning journey on your Homepage, by choosing a Learning Topic.



2.) Once you have chosen a library topic, it will open to all learning components within that topic.





3.) Click on a title to begin.

LIBRARY
Browse and search for available learning activities. You can use the Topics tab to narrow your results by subject and the Filters tab to apply additional criteria (such as the activity type or duration).

TOPICS **FILTERS**

All
Client Acquisition Advanced
Client Acquisition Essentials

CLIENT ACQUISITION ESSENTIALS
Share Topic

5 of 5 results for "**" Sort By: Name: A To Z

- Building Client Relationships: How to Succeed in Business, Part 1**
CURRICULUM
What does it take to turn a lead or a prospect into a lasting client? It is highly dependent on the relationships you build. When you c...
CA-BCA-CBL1_CU
☆☆☆☆ (0)
- Client Acquisition: The Power of Storytelling, Part 1**
CURRICULUM
Facts are statistics and information derived from research and study are typically emotionless and not open for debate. They are in...
CA-ANT-EST1_CU
☆☆☆☆ (0)
- Networking: Flap Your Wings - Being A Social Butterfly to Grow Your Business, Part 1**
CURRICULUM
Networking is opening yourself up to others to discover how you can help them. By the end of this course, you will be able to identi...
CA-NT-EST1_CU
☆☆☆☆ (0)
- Sales and Prospecting: Building Clients for Life, Part 1**
CURRICULUM
In this course, you will review key aspects of building client relationships. Building client relationships starts with setting a strong fo...
CA-SP-BC1_CU
☆☆☆☆ (0)
- Sales and Prospecting: Know Your Client, Part 1**
CURRICULUM
Before you start inviting the neighbors over to hear your presentation, it is important to make sure you are not wasting their time...
CA-SP-AY1_CU
☆☆☆☆ (0)

4.) Click REGISTER.

[Back to Library](#)

CLIENT ACQUISITION: THE POWER OF STORYTELLING, PART 1

Completion Status **REGISTER**

Client Acquisition: The Power of Storytell...

- Client Acquisition: The Power of Stor...
- Blog Article - Client Acquisition: The ...
- Coaching Guide - Client Acquisition: ...
- Mission - Client Acquisition: The Pow...
- Podcast - Client Acquisition: The Pow...

DETAILS ACTIVITIES SIMILAR ACTIVITIES

Full Description
Facts are statistics and information derived from research and study are typically emotionless and not open for debate. They are invaluable in presenting information to encourage one option over another. But, emotions are what drives us to make decisions. One of the best ways to elicit emotion is by telling a story. In this course, you will learn to identify and analyze the role stories play in client acquisition.


Additional Information

Library Details



5.) Click START ACTIVITY.

Congratulations! You have completed the registration process. Please look at the details below for more information about your registration status and activity progress.



CURRICULUM


CLIENT ACQUISITION: THE POWER OF STORYTELLING, PART 1

Completion Status [START ACTIVITY](#)

Client Acquisition: The Power of Storytell...

1. Client Acquisition: The Power of Stor...
2. Blog Article - Client Acquisition: The ...
3. Coaching Guide - Client Acquisition: ...
4. Mission - Client Acquisition: The Pow...
5. Podcast - Client Acquisition: The Pow...

[DETAILS](#) [ACTIVITIES](#) [SIMILAR ACTIVITIES](#)



COURSE


Client Acquisition: The Power of Storytelling, Part 1

REGISTERED

Required by parent

☆☆☆☆☆ (0) ♥️ 🔗

[START](#)




DOCUMENT

Blog Article - Client Acquisition: The Power of Storytelling, Part 1

REGISTERED

♥️ 🔗

[START](#)



DOCUMENT

Coaching Guide - Client Acquisition: The Power of Storytelling, Part 1

REGISTERED

[START](#)

6.) Click START LESSON to begin course.

Storytelling, Part 1

[START LESSON](#) [DETAILS](#)

EXIT COURSE



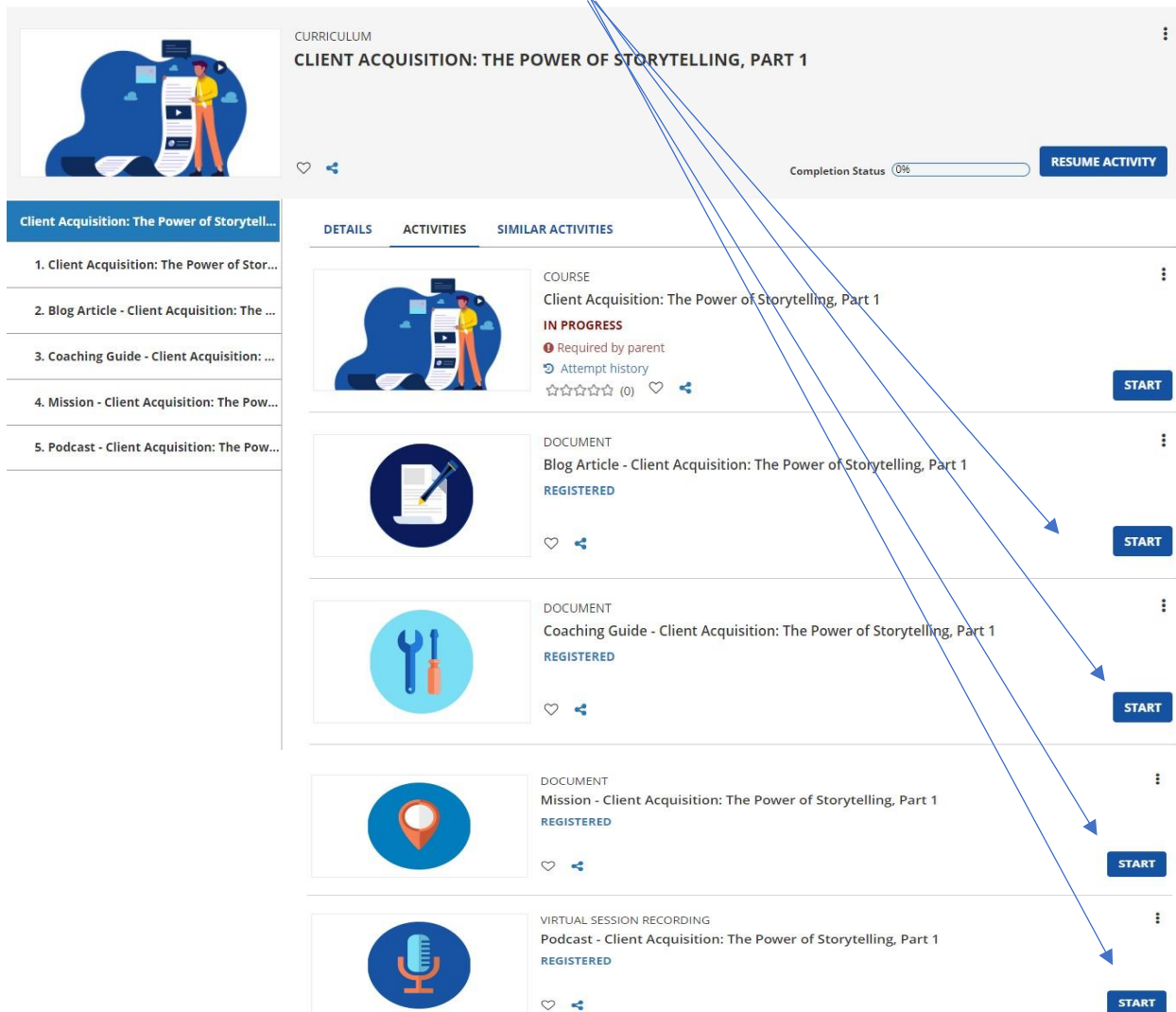
In this course, you will learn to identify and analyze the role stories play in client acquisition.

- ≡ Introduction
- ≡ Lesson 1: Why Storytelling is Important to the Advisor
- ≡ Lesson 2: The Stories You Should be Telling
- ≡ Lesson 3: Creating Your Story



7.) Click EXIT COURSE in the top right corner at any time to exit or find other components of curriculum such as, Blog Articles, Coaching Guides, Missions, or Podcasts.

8.) Click START to begin any component.



CURRICULUM

CLIENT ACQUISITION: THE POWER OF STORYTELLING, PART 1

Completion Status 0% [RESUME ACTIVITY](#)

Client Acquisition: The Power of Storytelling, Part 1

- 1. Client Acquisition: The Power of Storytelling, Part 1
- 2. Blog Article - Client Acquisition: The Power of Storytelling, Part 1
- 3. Coaching Guide - Client Acquisition: The Power of Storytelling, Part 1
- 4. Mission - Client Acquisition: The Power of Storytelling, Part 1
- 5. Podcast - Client Acquisition: The Power of Storytelling, Part 1

COURSE
Client Acquisition: The Power of Storytelling, Part 1
IN PROGRESS
Required by parent
Attempt history
☆☆☆☆☆ (0) [START](#)

DOCUMENT
Blog Article - Client Acquisition: The Power of Storytelling, Part 1
REGISTERED
[START](#)

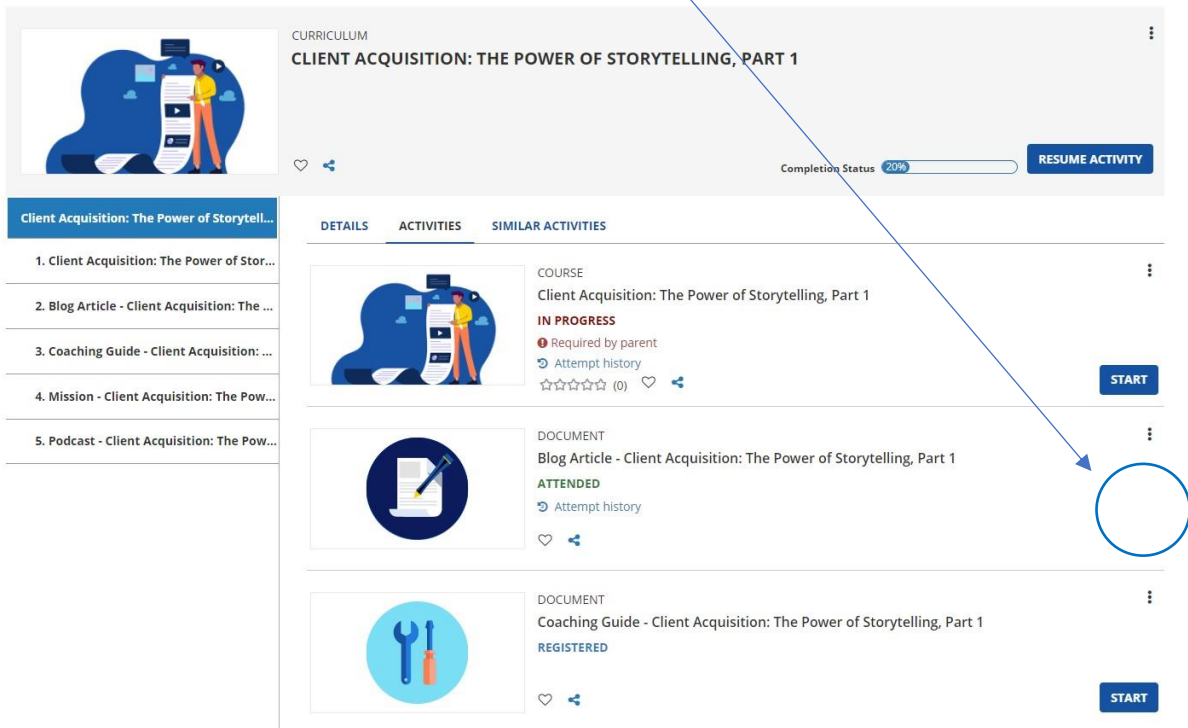
DOCUMENT
Coaching Guide - Client Acquisition: The Power of Storytelling, Part 1
REGISTERED
[START](#)

DOCUMENT
Mission - Client Acquisition: The Power of Storytelling, Part 1
REGISTERED
[START](#)

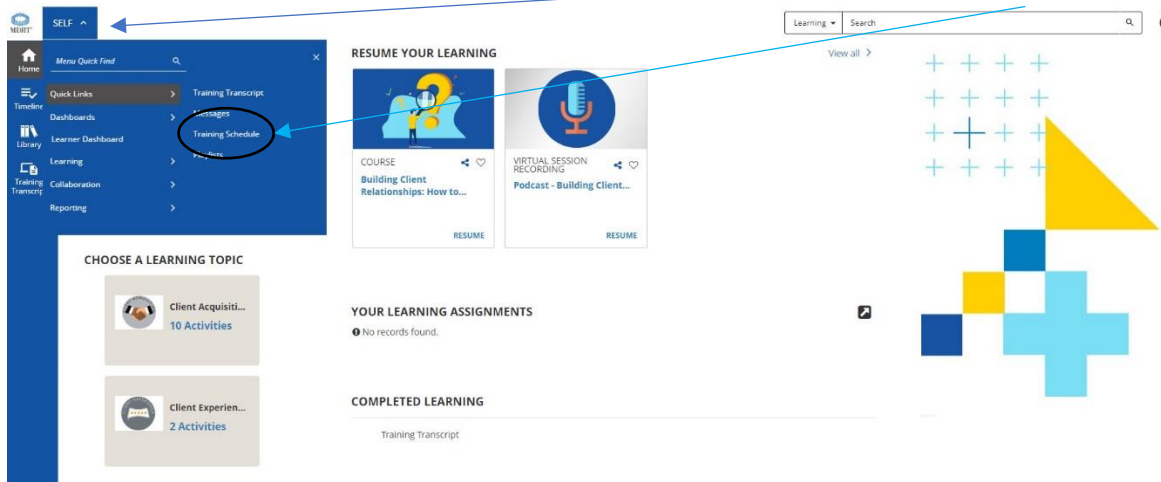
VIRTUAL SESSION RECORDING
Podcast - Client Acquisition: The Power of Storytelling, Part 1
REGISTERED
[START](#)



The **START** button is missing now that I exited the component. How can I access it again? (You must go to your “Training Schedule” page.) See instructions below:

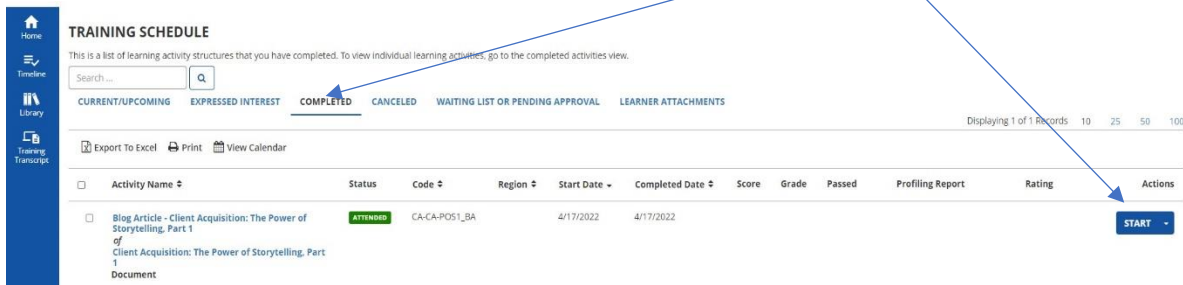


1.) If you have completed the component but would like to open it again, you must go to your training schedule. “Click Self”, then click “Training Schedule”.

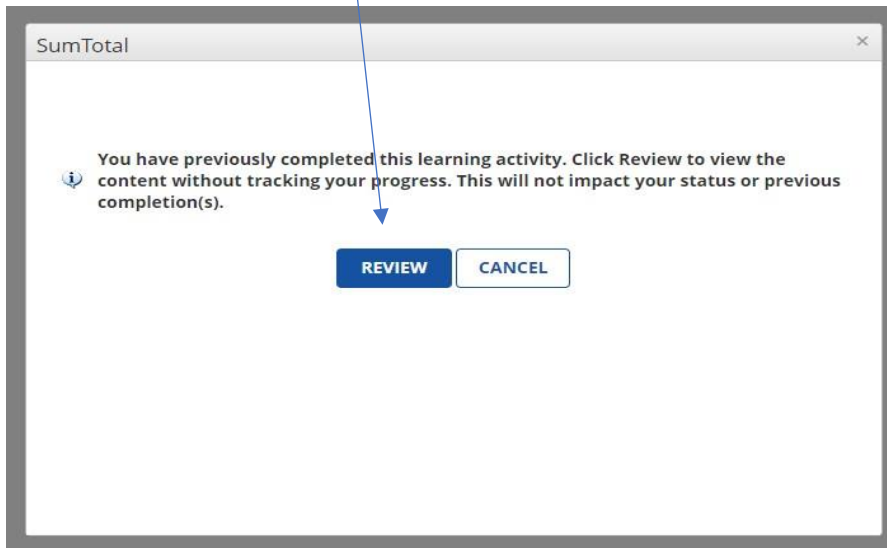




Once you arrive at your TRAINING SCHEDULE page. Click the COMPLETED Tab to find the training that you would like to re-open. Click START.



2.) When you click START, a box will open asking if you would like to review the content. Click REVIEW and the content will re-open.



How do I complete the course?

1.) To complete the course fully, you must go through the entire course, completing all lessons within and pass the Post Assessment with a score of 80% or better.

2.) You are **not required** to complete the other components such as the Blog Article, Coaching Guide, Mission or Podcast. However, you must open and click YES to complete each activity.

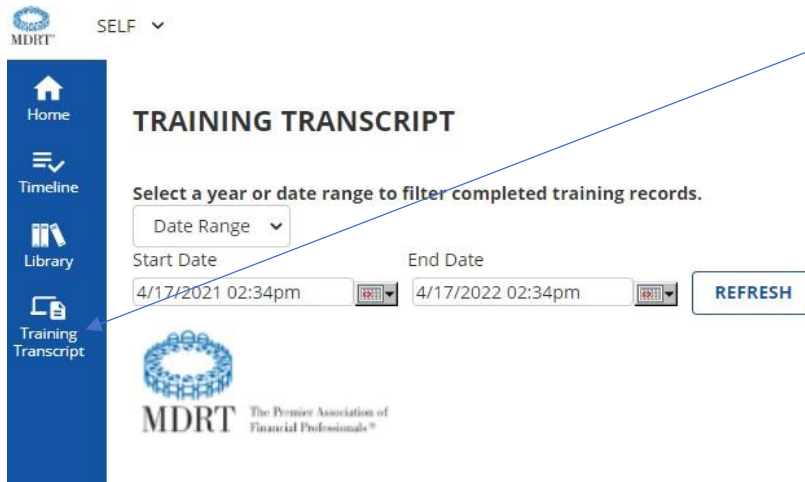
Have you completed this activity?





How do I print my diploma/certificate after completing the course?

1.) From left panel navigation go to your TRAINING TRANSCRIPT page.



MDRT SELF ▾

- Home
- Timeline
- Library
- Training Transcript**

TRAINING TRANSCRIPT


Select a year or date range to filter completed training records.

Date Range ▾

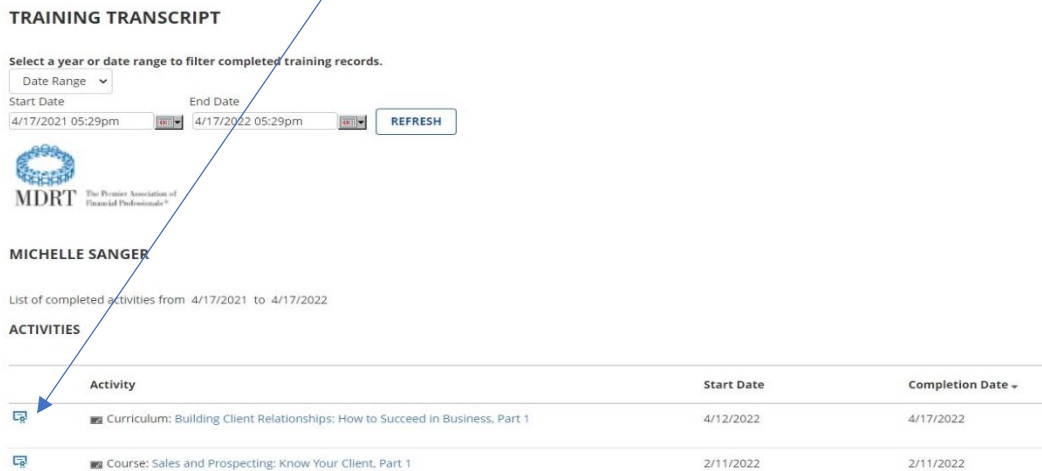
Start Date: 4/17/2021 02:34pm

End Date: 4/17/2022 02:34pm

REFRESH

 **MDRT** The Premier Association of Financial Professionals[®]

2.) Click on the [blue diploma icon](#) to the right of the completed course title



TRAINING TRANSCRIPT


Select a year or date range to filter completed training records.

Date Range ▾

Start Date: 4/17/2021 05:29pm

End Date: 4/17/2022 05:29pm



REFRESH

 **MDRT** The Premier Association of Financial Professionals[®]

MICHELLE SANGER

List of completed activities from 4/17/2021 to 4/17/2022

ACTIVITIES

Activity	Start Date	Completion Date ▾
 Curriculum: Building Client Relationships: How to Succeed In Business, Part 1	4/12/2022	4/17/2022
 Course: Sales and Prospecting: Know Your Client, Part 1	2/11/2022	2/11/2022

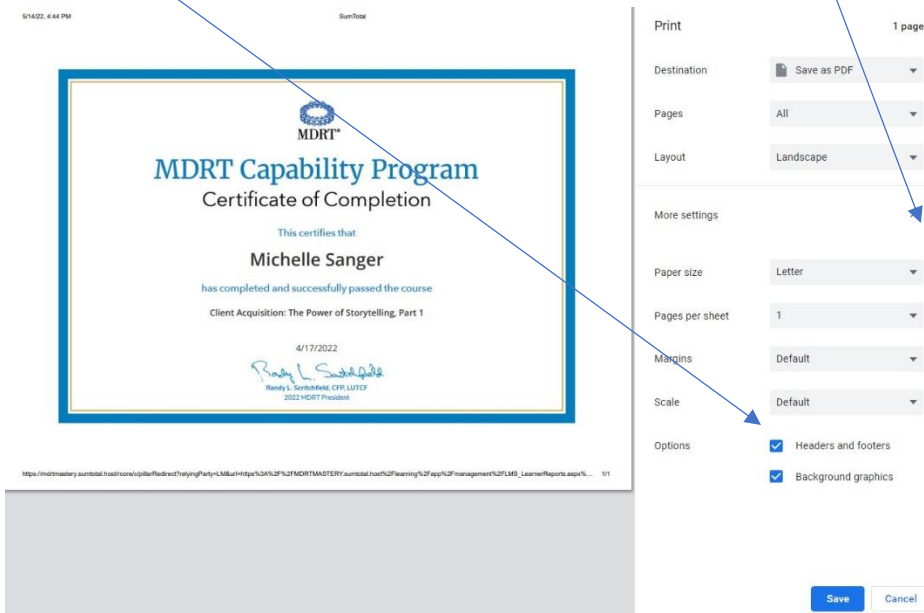


3.) Once you click on the diploma/certificate icon, your certificate will open in a new window. Click PRINT.



4.) If you do not see entire diploma, please update printer settings as shown below. Click the drop-down menu on More settings.

Check the boxes for Headers and borders and Background graphics.





How do I receive a Digital Badge?

- 1.) You must complete all courses in a Library Topic to receive a digital badge.
- 2.) Once you have completed all Library Topics in either the Essentials or Advanced level, an e-mail from our badging partner “Credly” will be sent to you with instructions on “How to receive your badge.” Follow the instructions to accept and receive your MDRT accomplishment digital badge.

How many Library Topics are available for me to complete?

Below are the **five** Library Topics, one Essential and one Advanced:

Client Acquisition Essential

Client Acquisition Advanced

Client Experience Essential

Client Experience Advanced

Practice Management Essential

Practice Management Advanced

Strategy and Vision Essential

Strategy and Vision Advanced

Whole Person Essential

Whole Person Advanced



I have exited the system and attempted to log back in, but I am getting an error message.

Important information:

If you are redirected to the MDRT Homepage when you attempt to log back in or receive an error message. Please **clear your cache (browsing history)**, exit the browser, and return to the log in page.

<https://MDRTMASTERY.sumtotal.host>

Where do I go if I need additional assistance in the Learning Platform?

If you need assistance beyond any of the instructions posted in the help menu, please follow the instructions below:

1.) E-mail Member Relations at: **MemberRelations@MDRT.org**

(In the Subject type – Learning Platform Assistance)

2.) Call Member Relations at: 847.692.6318

3.) Member Relations will assist you accordingly.