MDRT The Premier Association of Financial Professionals ®

CONTENT STRATEGY

APRIL 2019

MDRT'S PLAN FOR CREATING AND DELIVERING CONTENT OUR MEMBERS WANT, IN THE FORMAT THEY WANT IT, IN A WAY THEY CAN EASILY ACCESS IT.

Contents

Introduction

The Million Dollar Round Table produces a large amount of content, including publications, meeting presentations, podcasts, blog posts and more. These valuable resources help MDRT members and prospective members achieve three primary goals:

1. Develop professionally
2. Manage and build their practices
3. Maintain a healthy work-life balance

In 2015, MDRT began developing this content strategy to align our materials across multiple channels — Web, social media, email, print and live presentations — to meet our goal of developing content members want and can easily access.

The content strategy helps MDRT deliver:

- Increased awareness of and value perception for MDRT among current and prospective members
- A vision that connects the organization's goals with the needs of its audiences
- Improved findability of content by archiving older items that are no longer used regularly
- Translated content in key languages to increase its usage by a greater percentage of MDRT members

We have created MDRT's content strategy — comprising the documents included in the following chapters — to deliver a better experience for current and prospective members.

Kathryn Furtaw Keuneke, CAE
Director, Content Development

Key Audiences

PERSONAS AND CUSTOMER JOURNEY FRAMEWORK

To increase engagement, we must determine what our members want and deliver it. In the past, most of our input came from highly engaged members — those we met and worked with frequently.

Using data we collected as an organization, we developed four empathy-based personas that represent our most important global audiences. The empathy approach allows us to identify them as individuals.

Through this process, we determined that the biggest differentiator among our members is not geographical or language-based — it is the way they do business. Whether they are captive or independent, and whether they run their own practice are the factors that determine what type of content they want.

RYAN	JAMES
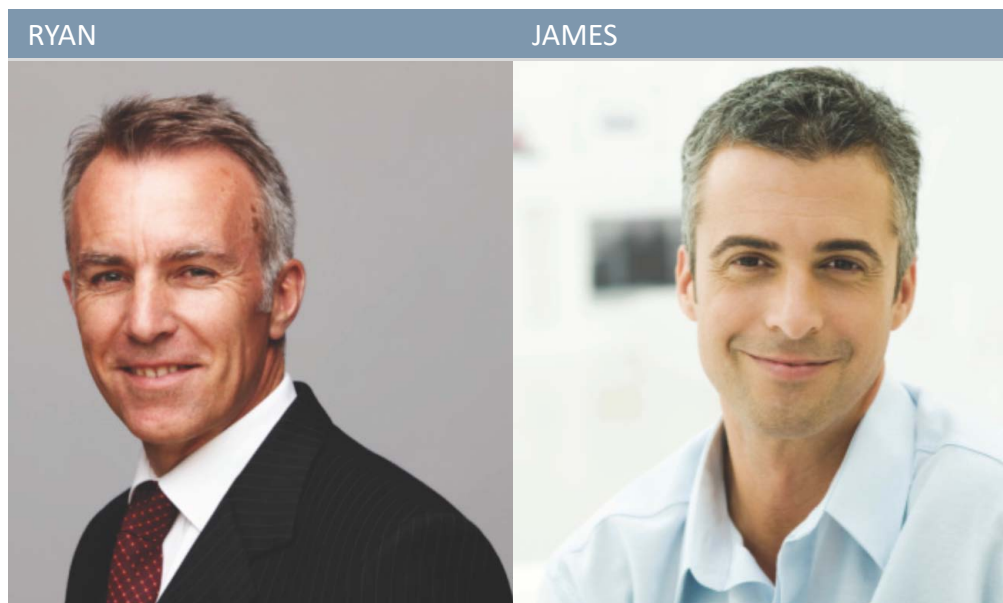
- 54, Ft. Lauderdale, remarried with children in college
- Successful business owner, manager, producer
- Thinks about succession and the value of his business

- 39, Dallas, married with a young family
- Considering going independent
- Will seek out info and resources he needs to move ahead

Confidential — for staff use only
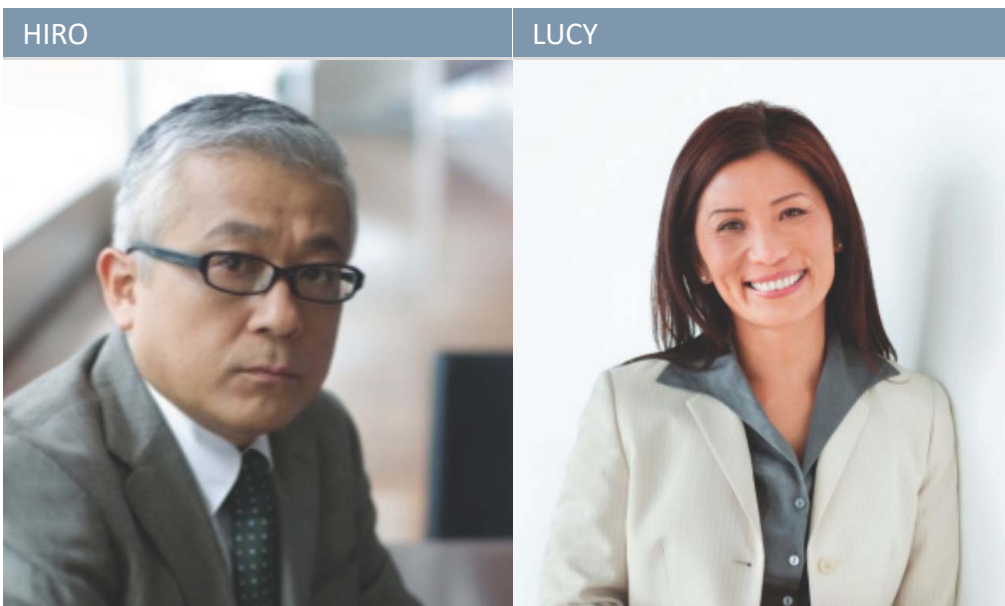
HIRO	LUCY
• 52, Tokyo, married with adult children • Captive agent and a top producer • Role as a mentor to younger team members	• 29, Seoul, single • New to the profession, captive agent • Focused on developing advantages in her company and in the profession

For the full details about MDRT's personas, see the persona empathy and experience framework.

HOW TO USE THE PERSONAS

As members and staff create content and develop programs, we should consider these individuals. Will what we're creating meet the needs of one or more of them? How does that determine its format, distribution and promotion?

Confidential — for staff use only

Editorial Guidelines

The primary audience for MDRT's content is current members. The secondary audience is prospective members, because we are always trying to prove our value. Through good navigation, design and editorial principles, we want to encourage visitors to MDRT's website and other content vehicles to absorb as much information as possible.

MEMBER DIVERSITY

As a global association, MDRT serves members from all over the world. Don't use images or words that may reinforce ethnic, national, racial, gender, religious, sexual preference or other stereotypes.

Avoid the use of "he or she," "he/she," "him or her" and other indecisive pronouns. Instead, use plural nouns or pronouns where possible.

PLAIN LANGUAGE

Write conversationally. Use the pronoun "you" to address users in a friendly, informal way.

Try to avoid buzzwords and jargon. Don't use formal or long words where shorter words will do:

- Cognizant of (use "aware of" or "knows")
- Collaborate (use "working with")
- Empower (use "enable" or "allow")
- Facilitate (use "help")
- Impact (as a verb, use "affect")
- Impact on (use "affect")
- Implement (use "begin" or "carry out")
- In order to (don't use, always superfluous)
- Innovative (instead, describe the outcome of the innovation)
- Is aware of (use "knows")
- Subsequent to (use "after")
- Utilize (use "use")

With technical content, such as financial information, present information simply so both U.S. and non-U.S. users will understand it. If you must use technical terms, always explain them in plain language. Remember, members outside the U.S. may have a harder time understanding this type of information — or it may need to be translated.

Follow these general rules to simplify content translation:

- Shorten long sentences
- Reduce sentence complexity
- Remove idiomatic expressions
- Eliminate grammatical errors
- Remove unnecessary words
- Focus on one thought per sentence

METADATA: HEADINGS, TAGGING AND DESCRIPTIONS

Most people look for information through an internal or external search engine. If they can't find your page, chances are they won't read your content.

Help users find your content by using the same vocabulary they use, starting with your page title, summary and first paragraph. Use tools like Google Trends to figure out the most popular search terms: For example, "business continuity" is more popular than "business continuation."

Where possible, help your audience decide what they want to see without actually requiring them to dive in first. Metadata — "information about information" — can help give them a taste of the content before they take action to access it.

Determine the most popular keywords for the different areas on MDRT's site, and use them in:

- Titles and subheads
- Tabs
- Introductions
- Metadata descriptions

Descriptions

Under each content type in the Resource Zone — e.g., magazine articles, presentation transcripts, videos — a short description of the item gives prospective viewers an idea of what it is before they click on it. The description may also entice people to explore content they had no intention of exploring previously.

Video title:	Embracing the why
Don't write:	"Have you ever wondered why you are in financial services"
Do write:	"Pierce explains how a simple exercise changed his life."

ACCOMMODATING ACCESSIBILITY, MOBILE AND TRANSLATION NEEDS

It is important to understand how people with various abilities and disabilities use a site. The power of any website is in its universal accessibility. Associations that provide accessible experiences to their site visitors are seen as socially responsive and more open to diversity. Following these guidelines will result in content that is also more effective for mobile users, as well as easier to translate.

Sight

People with limited or no vision need information to be converted to a format they can understand with assistive technologies, such as audio. However, that cannot happen unless the content is designed for accessibility.

Some examples of sight accommodations include:
- Add alt text to images — and only use images that add to the discussion.
- Use short content with minimal links.
- Avoid terms like "click here," which don't make sense to people using a screen reader.
- Avoid low-contrast color combinations that are difficult to read for people with low vision (for example, blue links on black backgrounds, or red text on green backgrounds).
- Avoid text within graphics, which cannot be enlarged without special software.

Hearing

Websites increasingly include video and multimedia content. Accommodations for people with hearing loss may also help people uncomfortable with English:
- Provide transcripts and captions for videos, podcasts and other audio content.
- Offer options to view transcripts in other languages to cater to an international audience or those for whom English is a second language.

Touch

Some people cannot use a standard keyboard and mouse or track pad to access a website. People with tremors or poor fine motor control may prefer a trackball or rely on the keyboard (as those who are blind do).

Examples of ways to help people with motor disabilities include:
- Allow users an unlimited amount of time to complete tasks.
- Simplify controls for media players and any other kind of time-dependent content.
- Simplify search, because people with motor disabilities may have trouble finding the right key for search terms.
- Avoid an excessive amount of data entry.

Many of these accommodations also simplify tasks for people on mobile phones and tablets.

Meaning

Because it is impossible to know exactly who your audience is, use plain language and explain any background information that users may not know. For example, with a global membership, what may be obvious to American members may not be clear to Asian or Latin American members.

Supplement text with audio, video, infographics and other alternative formats because people who have difficulty with one format may have better comprehension with another.

STYLE

For MDRT-specific style questions, please refer to the <u>MDRT Style Guide at a Glance</u>.

Headers

The first two levels of headers should contain keyword phrases for search engine optimization (SEO) purposes. Check Google Trends to see the most popular search terms, and use them consistently throughout your site.

Make headers grammatically parallel. For example, if three of the subheads on a page are "Reach new heights," "Emerge as a leader" and "Make a difference," the fourth shouldn't be "*Round the Table* magazine." To make it grammatically parallel, write something like "Discover *Round the Table* magazine."

Avoid writing questions or using punctuation in headers.

Length

Web content should be shorter than print content. People scan rather than read on the web.

To accommodate user needs:

- Focus on one main idea per paragraph.
- Include no more than three to five short sentences per paragraph.
- Write sentences of 15 words or fewer.
- Write paragraphs of 40–65 words on average.

Since the site will also be used on phones and tablets, shorter content always works best.

Links

Search engines analyze links to determine the relationships between web pages. They look at the link text, the surrounding content and the target page. That's why including keywords in links is very important. If you use generic text such as "Read more" or "Click here," you weaken potential search results and risk stranding the user.

A good experience with an internal link:
- Uses keywords that make it clear where the link will take the user
- Limits the number of links per page
- Uses words, not an image or URL, as a link

Lists
- List items should all be structured the same way. For example, if one list item is a noun, they should all be nouns. If one list item starts with a verb, they should all start with verbs.
- Don't use commas or semicolons after items in a list, or the conjunction "and" before the last item on a list.
- Use numbered lists where the list items need to follow a specific order in a sequence.
- Use lettered lists when items don't need to follow a specific sequence, but users may need to refer to specific items in the future. If you mention the letter from the list later in the text, enclose it in parentheses.
- Use bullets for lists that are not in hierarchical or chronological order. If possible, put items in some kind of order, such as alphabetical order, if that makes sense with the subject matter.
- Capitalize the first letter of all bulleted items.

Topics and Subtopics

OVERALL PHILOSOPHY

Topics are a useful way to organize content for easier discovery and use. MDRT has a set of four topics, as well as numerous subtopics, that are consistent across the organization. Effective topics reflect the organization's current priorities and/or audience interests, and so they may change over time. The subtopics need to be both flexible and organized, since inconsistently entered information cannot be collected and displayed together.

MDRT's Resource Zone has a consistent set of topics that carries across the website and the organization's meetings. The topic definitions should be listed on the website.

Subtopics will be reviewed at least once a year and cleaned up.

Note: The topics and subtopics included at the end of this section may change over time, but MDRT's content will not include industry reporting or advocacy efforts.

TOPIC MANAGEMENT

A topic or subtopic may come about strategically, from the top down, or organically, from the bottom up, such as through user search frequency, discussion in committee meetings or surveys.

A set of content should be considered a subtopic when:
- There are five or more content items about the same subject
- Content owners have put concrete plans to publish content in the next month and have posted those items on the editorial calendar and/or vetted ideas through the director of content development
- MDRT plans to create content on the subject based on *mdrt.org* search queries and external demand as expressed through member or leadership surveys or other channels

When content is published, particularly in the Resource Zone, content owners select one topic and one subtopic. The content development director will review all subtopics each quarter and add frequently used subtopics to the system, so that content owners choose rather than enter them. Each year, the content development director will review all topics and subtopics and remove those that are no longer in use.

CURRENT TAXONOMY

The following topics and subtopics are used in the Resource Zone and MDRT app.

Advising Clients

The application of products and planning to minimize risk and increase clients' assets for the future.

- Insurance solutions
- Financial planning
- Retirement planning
- Fact-finding
- Wealth management

Practice Management

Best practices for hiring and managing staff, case management, servicing, record keeping and other activities associated with business operations.

- Staffing
- Business processes
- Client service
- Study groups
- Regulatory compliance

- Time management
- Charging fees
- Technology
- Coaching
- Business planning and continuity

Marketing

Processes and activities that promote professionals, products and services for specific markets.

- Prospecting
- Referrals
- Branding
- Centers of influence
- Communication techniques
- Objections
- Target marketing
- Social media

Whole Person

The elements that, when in balance, enable financial services professionals to lead a full and enriching life.

- Balanced living
- MDRT Foundation
- Motivation

Content Access Levels

OVERALL PHILOSOPHY

MDRT's content is an important benefit to members. As such, some material is reserved for members only, and some is available only to those who have attained elevated levels of membership. However, our content is also an important way to attract prospective members to our website and give them a taste of what MDRT membership offers. To that end, some material is publicly available.

MDRT has six levels of content access:
1. Public
2. Registered user
3. Mentoring aspirant
4. MDRT member
5. Court of the Table
6. Top of the Table

PUBLIC

MDRT makes some of its content accessible to the public in full without a password. Public content on *mdrt.org* can be shared with prospective members, which could lead to further exploration of our website, meetings and benefits. Public content is crawled and indexed by search engines, driving prospective members to *mdrt.org*. Public content can also be promoted and shared on social media channels, or via email.

The following content is available to the public:
- A variety of current member content, to include content that's not confidential, sensitive or proprietary (no Top of the Table content or contract-restricted items)
- Five featured assets on the Resource Zone home page
- MDRT President's Annual Meeting presentation, in one or more formats
- All of the following content:
  - *Round the Table* articles
  - Video interviews (not meeting presentations)
  - Podcast episodes
  - Infographics

In addition to the content in the Resource Zone, MDRT also makes the MDRT Podcast, MDRT Presents and the MDRT Blog — each hosted outside the Resource Zone through third-party vendors — accessible to the public without login at *mdrt.org/podcast, mdrt.org/presents* and *mdrt.org/blog.*

REGISTERED USER (THIS IS NOT CURRENTLY IN USE)

Registered users-only content is accessible to anyone who has registered (by providing information about themselves) for the site and logs in. Registered users-only content serves industry contacts and prospective members, allowing them to try MDRT's content and increase their productivity — or their agents' productivity — to be able to qualify for MDRT.

The following content is available to registered users:
- All content available to the public
- Non-member-directed meeting content
- Past Annual Meeting presentations in audio, video and text format that are more than two years old (no Top of the Table content or contract-restricted items)
- Excerpts of meeting presentations

MENTORING ASPIRANT

Mentoring aspirant-only content is accessible to anyone who has registered with MDRT's Mentoring Program. This content serves aspiring members, allowing them to try MDRT's content and increase their productivity to be able to qualify for MDRT.

The following content is available to aspirants:
- All content available to the public and registered users
- Past Annual Meeting presentations in audio, video and text format that are more than one year old (no Top of the Table content or contract-restricted items)

MDRT MEMBER

Members-only content is available to all current MDRT members who log in.

The following content is available to current MDRT members:
- All content available to the public and registered users
- Annual Meeting presentations in audio, video and text format
- Past Top of the Table Annual Meeting presentations in audio, video and text format more than two years old
- Templates and worksheets
- Any Resource Zone content that is confidential, sensitive, proprietary or is not allowed to be shared outside the membership because of specific contractual agreements

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COURT OF THE TABLE

Court of the Table members-only content is accessible to current Court of the Table members who log in.

The following content is available to current Court of the Table members:
- All content available to the public, registered users and MDRT members
- Past Top of the Table Annual Meeting presentations in audio, video and text format more than one year old

TOP OF THE TABLE

Top of the Table members-only content is accessible to current Top of the Table members who log in.

The following content is available to current Top of the Table members:
- All content available to the public, registered users and MDRT members
- Top of the Table Annual Meeting presentations in audio, video and text format

Translation Strategy

MDRT is a global organization. The majority of members live outside the United States, many in non-English-speaking countries. Therefore, the organization needs to provide content that can serve non-U.S., non-English members as well as it serves English-speaking members.

CONTENT CREATION CONSIDERATIONS

Writing

The following writing guidelines will help the organization create content that is easy to translate or adapt as necessary.

- Write short and clear sentences
- Limit dependent clauses
- Avoid idiomatic expressions (e.g., "a blessing in disguise")
- Avoid cultural references such as sports metaphors or quotations.

These practices helps translators work quickly, decreasing the cost of translation.

Revisions

It is expensive and time-consuming to re-translate existing content, so minimize revisions, and only translate final, approved content. Ideally, content will be translated before it is published in English, but if that is not practical, the translated versions should be published as soon as possible.

Glossary of preferred terms

A best practice is to create a glossary of preferred English terms, and ensure that content uses those terms, rather than synonyms. While this slightly limits creativity, it significantly increases ease of translation, as well as ease of understanding for non-English speakers.

WHICH LANGUAGES?

Content created by the Content Development Department is focused on the six primary languages with their own websites (English, Japanese, Korean, Spanish, Simplified Chinese, Traditional Chinese).

(Note: Round the Table *and the Annual Meeting "Proceedings" have separate, established policies that determine their translation.)*

Ideally, Resource Zone analytics would help us determine which content topics and formats should be prioritized for translation from English to each of the five major languages. However, we don't have enough

activity in the Resource Zone in other languages to decide this way. Until that changes, we will decide on a case-by-case basis using the guidelines below.

Our process to determine which content to translate into which languages includes consultation with MDRT chapter offices and satellite offices.

Below is a list of questions to determine whether new content (not including *Round the Table* and the "Proceedings") will be translated or adapted into any of our five major languages.

- Is the content applicable to the market that speaks this language?
    - o Does it focus on products or processes the audience uses?
    - o Does is focus on products or processes the audience might soon be dealing with (because of market changes or regulation)?
    - o Is it focused on inspiration or motivation and therefore relevant to all MDRT audiences?
    - o Is there anything about the content that makes it culturally insensitive to this audience?
    - o Does data show this topic is popular with this audience?
- Is the content relevant to a significant number of individuals in the market?
  (Note: Use the decision criteria worksheet to determine ROI and overall score.)
    - o Would the content apply to any of the personas who could be members of the market?
- If only some of the content is applicable to the market, is it substantial enough to stand on its own (removing what is irrelevant)?
    - o Is it worth adapting the ideas in another format if they can't stand on their own in this format (e.g., creating a written sales idea from a portion of a video)?

For videos, text subtitling is preferred, rather than voiceover.

Contributor Philosophy and Permissions

MDRT's competitive advantage with content is having the viewpoints of the best minds in the profession. Our content primarily features ideas that are proven successful by MDRT members.

MEMBERS

Overall, we strike a balance between using new names and using trusted contributors. This strategy can differ by format. For example, it is easy to take a chance on a new member for a magazine article because we have a lot of control over the final product, and the cost is minimal for a phone conversation. On the other hand, for a video shoot, there is a significant vetting process to determine if we have the right fit because of the travel, scheduling, pre-work and costs incurred.

NONMEMBERS

Just as the Annual Meeting programming includes some outside speakers, MDRT content includes subject-matter experts from outside the membership. Other contributors are used to provide ideas on topics outside our members' expertise. Examples of this include staffing advice (an area many members say they struggle with) and consumer psychology.

However, we don't include outside contributors who work in the financial services profession in the same way as MDRT members.

PERMISSIONS

MDRT is built on a sharing culture. Members who are interviewed by the Content Development Department have agreed to have their work published in a specific format. If we would like to use that work in another format, we should ask them. Our video interviews, because of the planning and expenses involved, require the interviewee's signature on a video agreement, stating how we can use the content. Other forms of content gain permission informally.

When we are repurposing content from a live event, permission to reuse is usually granted in a contract executed by the Professional Development Department. It is important to check the contract for any restrictions before reusing the content.

We occasionally get requests from other industry organizations to grant reprint rights. Please note that only articles written by staff or content that MDRT owns the copyright to should be reprinted without first

contacting the author. When an outside author has contributed an article, contact them with your plans to be sure they are OK with it. Most are happy for their article to get exposure with another audience.

Legal Considerations

It is important for staff, member leaders and content contributors to keep MDRT's idea sharing lawful by recognizing submissions and discussions that could violate laws and cause MDRT legal trouble.

ANTITRUST LAW

U.S. antitrust law preserves and promotes free competition. Therefore, any agreement or implied agreement among competitors to sell products/services or set terms of service at the same price is prohibited.

Examples

Consider the following examples that violate antitrust law:

- Sharing a producer's schedule of fees they charge clients for services (e.g., stating they charge $10,000 for a financial plan and 1.5% ongoing service charge for investments)
- Producer's advice to establish a fee by building in a specific profit margin
- Discussion about actual fees or prices that develops during a committee meeting, meeting session, or any other gathering or presentation
- Discussion of actual commission split ratios, such as a 50/50 split

In all cases, we should instruct authors and presenters to leave out actual dollar (or any currency) amounts and/or percentages, unless they state they are using an arbitrary number for the sake of showing calculations. Using actual dollar amounts could be misconstrued as asking other MDRT members to agree on a set price.

If authors and presenters are unaware of or fail to follow these guidelines, as staff and member leaders, we must be prepared to step in to stop the discussion or halt the publishing process.

On any published materials (such as in the Proceedings, meeting handouts, PowerPoint presentations, MDRT Podcast, Round the Table magazine or Resource Zone) dealing with the topic of fees and pricing, our attorney recommends including the following statement that would be visible to content users:

This example is for educational and information purposes only. Each professional should set his own terms and conditions of engagement with the client through the process of negotiation.

COPYRIGHT LAW

U.S. copyright law is in place to protect creators of original works. When MDRT knowingly or unknowingly infringes on a creator's rights, we risk lawsuits.

Any speaker or content contributor who would like to use another creator's work in their presentation must secure permission to do so.

Examples
Consider the following examples that infringe on the copyrights of others:
- Reciting a poem someone else wrote
- Including material (text, cartoons, photos or artwork) from another creator in your manuscript, handouts or slides
- Using music, video or movie clips in your presentation or materials

All of the above examples can be done legally, but they would all require written permission from the creator, and possibly even usage fees. If MDRT republishes the content, including internet publication, the written permission must extend to MDRT.

As you work with members and outside experts to submit ideas and develop presentations, please keep these points in mind.

MDRT staff serves as the final gatekeeper in this matter, but you can help us set the proper tone for idea sharing. Please contact the content development director with any questions.

Current Tactics

The content strategy gives us a foundation for executing tactics. Following are MDRT's current tactics for providing content to our members and prospective members. These evolve as MDRT's business goals change.

CONTENT FORMATS

Round the Table magazine

Round the Table (RTT) is a magazine for the world's best financial professionals. Delivering business solutions, transferable ideas, practice management and technology tips, RTT provides relevant content for producers at every career stage. As the official publication of the Million Dollar Round Table (MDRT), RTT connects members with each other through profiles on producers around the world and information on MDRT's programs and events.

RTT's target audience is MDRT members. Content is focused in three areas:

- **How-to advice:** The Round Table thrives on idea sharing among its members. Readers want to know how to make the sale, enter new markets, find new prospects, increase productivity, handle objections or better manage their practice. As entrepreneurs, MDRT members want to learn about running their business more efficiently, including technology tips, information on staff, procedures, office space, marketing, compliance and succession planning.
- **Success stories:** Learning from one another is the reason MDRT exists. MDRT members want to know how their peers are doing business and what makes them successful. How have you found success in a specific market? In your part of the world, what issues are producers facing, and how have you adapted? MDRT members also seek balance in their lives. How have you been able to maintain — or even increase — your success in this profession while making time for other priorities?
- **Inside MDRT:** RTT enters members' offices and homes six times a year. This provides them a tangible reminder of their membership in MDRT and the benefits offered. This section keeps members informed of what's going on in the organization, including finances, meetings and production requirements.

The magazine is published bimonthly in 10 languages. Content is created by headquarters staff in English and translated into Korean, Japanese, Spanish, Simplified and Traditional Chinese, Thai, Bahasa Indonesia, Vietnamese and Hindi. In the Korean and Japanese versions, additional content (up to 12 pages) is added from the local chapter. This content primarily covers chapter events.

RTT content is selected with a global audience in mind. Articles included in the magazine are intended to be applicable to members in every segment and geography, and to play up MDRT's strength as a global network.

RTT was first published in 1960. It was redesigned in August 2014 with the content strategy as outlined above. Staff coordinates some of the articles in RTT with content in other formats. Each issue includes articles driving readers to other specific content items in audio and video format.

The 2014 U.S. Members Insights Survey showed the value of the RTT article format to members. The survey found that 95.7 percent of respondents find the article format useful. In the 2015 MDRT Communications Survey, conducted as part of the project to develop MDRT's content strategy, respondents indicated RTT was at the top of the list among MDRT's content offerings. The 2016 Member Benefits Survey showed the following results:

- Round the Table readership is strong, with 46% of responding members reading 5-6 issues in the past 12 months.
- More than half of responding US members (54%) and those more established in their career (58%) indicated reading 5-6 issues in the past 12 months.
- The majority of members (80%) read Round the Table when they receive it. Nearly one-half (47%) also save all or part of it for reference.

In the 2017 Comprehensive Global Research survey, RTT was rated by 65% of all members as excellent or very good. (That percentage is 75% in the U.S.) Following are the findings from all members about the value of RTT:

Attribute	Excellent	Very good	Total
Overall quality	26%	39%	65%
Providing relevant content / topics of interest to you	26%	40%	66%
Offering content unique from other MDRT publications and communications	25%	40%	65%
Providing ideas and insights you can put into practice immediately	27%	38%	65%
Being available in your native language	44%	30%	74%
Providing an appropriate balance of sales-focused and practice management-focused articles	27%	40%	67%
Providing a global perspective on top producers in the industry	26%	39%	65%

MDRT Blog

The MDRT Blog, launched in April 2016, provides continuous, fresh content on MDRT's website. A minimum of two posts per week are published featuring both new and repackaged content. The MDRT Blog supplements MDRT's other content offerings by providing short-format articles. Most of the articles/posts work to drive members to additional resources, especially in the Resource Zone.

The MDRT Blog is hosted on MDRT's website using WordPress. It is accessible by the public, giving prospective members a taste of the content MDRT offers. This open access allows the content to be found by search engines, driving prospective members to MDRT's website. However, to get the full benefit of the content presented, prospective members need to register and log in to click through to view the full assets the blog posts link to.

The MDRT Blog provides a venue for daily updates during the Annual Meeting. Staff writes and posts ideas and photos live from the meeting.

A successful blog post draws 1,000 views in its first month published.

The MDRT Blog is currently published in English only. Most of the content is globally applicable, but occasionally U.S.-focused topics are included. The topics hit every member segment.

The 2016 Member Benefits Survey showed the following results:
- 21% of members have read a MDRT blog post in the past 12 months
- Among MDRT blog readers, 25% read a post each week
- Most MDRT blog readers share blog posts (just 27% do not)
  - 41% share them with non-members

MDRT Podcast

Launched in January 2015, the MDRT Podcast is a series of monthly audio episodes (approximately 10–15 minutes long) showcasing MDRT members' globally applicable tips for adding value to your practice, increasing business efficiency, appreciating clients and more. The topics target the sales mastery and business development member segments. Each episode can be streamed or downloaded at mdrt.org/podcast, which leads to SoundCloud, a third-party audio platform. Individual episodes are also posted in the Resource Zone, which links back to SoundCloud because it is streaming-friendly.

A successful podcast episode draws 1,300 plays in the first month and 2,000 plays in the first year.

The MDRT Podcast is currently published in English only, but a Spanish version is promoted to members in Mexico: MDRT Latinoamerica. It is also hosted on SoundCloud.

The 2016 Member Benefits Survey showed the following results:

- 21% have listened to MDRT Podcasts in the past 12 months
- 41% are aware of them but do not use them as a resource
- 48% of responding US members were not aware of MDRT podcasts
- Half of the podcast users are in their office when listening
- 47% of the respondents said the desired frequency for listening to MDRT Podcast episodes was once a month

MDRT Presents

Launched in January 2017, MDRT Presents is a podcast series hosted on SoundCloud that features Focus Session audio from Annual Meeting member speakers. These provide a way to repurpose relevant material and expand the audience for these useful presentations about a wide variety of ways for members to enhance their practices. The episodes are unedited and average 300–400 listens in their first few months.

MDRT Connect e-newsletters

MDRT's e-newsletters have been overhauled since 2015 to change from primarily promotional vehicles to content-focused member benefits. There are three main e-newsletters:

- **MDRT Connect** — Published twice per month, this e-newsletter is sent to all English-speaking members who have valid email addresses on record. Content targets all member segments. Each issue includes brief ideas to drive readers to four or five content items in the Resource Zone and other MDRT content platforms.
    - o **Follow-up issue** — Any member who clicks on the top, highlighted resource will receive a follow-up email with three resources on a similar topic. The follow-up email is sent to an average of 250 members, and two go out each month.
- **Court of the Table Connect** — Published monthly, this e-newsletter is sent to all Court of the Table members. (This is a slight variation of the regular MDRT Connect and replaces one of the issues each month for Court of the Table members.) The content strategy is the same as for the MDRT Connect — driving traffic to MDRT's variety of content. The replaced item is exclusive content for this audience. Content targets all member segments.
- **Top of the Table Connect** — Published monthly, this e-newsletter is sent to all Top of the Table members. (This replaces one of the issues each month of the MDRT Connect for Top of the Table members.) The strategy is to focus on business ownership topics, such as staffing, office management and business planning. The content strategy is the same as for the MDRT e-Newsletter — driving traffic to MDRT's variety of content.

In the 2017 Comprehensive Global Research survey, the MDRT e-Newsletter was rated by 57% of all members as excellent or very good. Following are the findings from all members about the value of the MDRT e-News:

Attribute	Excellent	Very good	Total
Overall quality	20%	37%	57%

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Providing timely information	24%	39%	63%
Providing relevant content / topics of interest to you	23%	39%	62%
Making it easy to access additional articles or content of interest through the MDRT website	23%	39%	62%
Being a "quick read"	23%	38%	61%
Making it easy to save and share articles	23%	38%	61%
Offering content unique from other MDRT publications and communications	21%	39%	60%
Begin available in your native language	35%	33%	68%

Video interviews

Original video interviews launched in January 2016 as the "High-Performing Office" series, providing an up-close look at financial services producers' offices run by high-producing MDRT members with highly engaged staff. The video series covers everything it takes for a financial services office to be successful — from implementing solid business fundamentals to providing outstanding client service. Today, the original videos include interviews during the Annual Meeting and in other settings, including members' offices. The videos range from one to eight minutes in length and target the sales mastery and business development member segments.

The strategy for the in-office videos is to provide globally relevant practice management best practices, captured from members sitting in their own office. In some cases, staff interviews are included. Video allows viewers to feel as though they are visiting a successful colleague's office and receiving a special behind-the-scenes look while learning in-depth information about what makes a high-producing office function well.

Strong-performing videos receive 2,000 views in the first year after they're published. The best-performing video has 6,000 views.

CONTENT FOR TARGETED AUDIENCES

Our website analytics show that our audience is interested in both video and text content. Therefore, we offer a variety of formats when pushing content to targeted audiences.

In-language content (Japanese, Korean and Spanish)

Feedback from members in these countries has shown that the topics covered in all formats are relevant to them, but they would like more content featuring members working in their market. In late 2015, we began working with a vendor in Japan and a vendor in Korea to create in-language content for these audiences. In June 2016, the first original content in Korean was published on the Resource Zone. A video and an article

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featured an MDRT member from Korea, and a second article and podcast featured a younger member interviewing a more experienced producer. These interviews are conducted in-language. Monthly content is planned, with one resource each month in text format and one in video format. This strategy for both languages was determined through one-on-one interviews with at least 15 members in each of those countries.

In late 2017, we added in-language content in Spanish. Monthly, new content in text, audio and video formats are created. The audio is posted in the Resource Zone, but hosted directly on SoundCloud, https://soundcloud.com/podcastmdrtlatinoamerica

Our goal is for the content to be on par with MDRT's other resources, while allowing differences as preferred by the target audiences' cultures. We rely on our chapter colleagues, consultants and the vendors we've hired for this insight.

This content is distributed per the preferences of the audience:
- Korean members — An MMS campaign distributes on a monthly basis the original content created for that audience in the form of designed articles and videos. Along with the original content, two to three other hand-selected resources are promoted each month in the highlighted section of the Resource Zone.
- Japanese members — An email campaign distributes on a monthly basis the original content created for that audience in the form of designed articles and podcasts.
- Spanish-speaking members — MDRT sends a monthly email with links to the three new content items and one additional item, and also promotes the content through an SMS campaign.

First-time members (U.S.)
In early 2016, a plan was developed to provide content to the Class of 2016 to help them qualify for a second year of membership.

The content selected for this audience is focused on the sales mastery and business development segments and includes the following topics:
  - Staffing
  - Business processes
  - Technology
  - Prospecting/referrals
  - Objections
  - Business planning
  - Whole Person

"Class of" special issue of RTT. The issues in 2016, 2017, 2018 and 2019 were full-length magazines redesigned and reorganized specifically for this audience. The content was designed to help them increase

their production and improve their office efficiency, understand the value of what other MDRT members have to offer them, and to become familiar with and understand their member benefits.

Class Notes e-newsletter. Class Notes contains membership tips and stats, as well as links to content in each issue.

RESOURCE ZONE

The Resource Zone is a central location for MDRT's multimedia content, and most of it is first published in other media, such as *Round the Table*, or live at an MDRT meeting. However, some of the content — video interviews, case studies and tools such as worksheets — appears only in the Resource Zone.

Original content
The items that are first published in the Resource Zone include the following:
- Targeted content for specific audiences (includes articles and case studies)
- Video interviews
- Member-submitted worksheets and templates
- Guides (such as Study Groups Best Practices Guide)
- User-generated content

Guidelines for inclusion
The purpose of the Resource Zone is providing how-to information to help our members do business better. While that is true of most of what MDRT publishes, some RTT articles are outdated soon after they're published and/or promotional in nature, and some just aren't likely to ever be referenced. As a result, the following types of articles are not published in the Resource Zone:
- Annual Meeting Main Platform recap articles (except those for speakers not included in the Proceedings)
- Production goals articles
- MDRT Finance report articles
- MDRT Foundation grant awardee lists
- Articles about MDRT benefits
- Meeting recap articles

Guidelines for archival (lifecycle)

All content on the Resource Zone follows a lifecycle: It is conceived, created, lives on the website, is promoted, remains for a certain length of time, is reviewed regularly, and is eventually archived. This is how we ensure outdated content doesn't remain on the website, and will also substantially improve the findability of the existing content.

The archived section of the Resource Zone is accessible to members who used the advanced search, and when search results number five or fewer.

The following chart shows the typical lifecycle by content type:

- Article   5 years
- Infographic   2 years
- Templates/worksheets   10 years
- User-generated   2 years
- Guides   10 years
- Audio   5 years
- Video   10 years
- Case studies   4 years
- Meeting presentation   5 years

Content is automatically archived based on the chart above. Items can be changed by staff to remain active on the site past their archival date if warranted.

Highlights

The Resource Zone highlights (which shows five assets at a time) is updated weekly in English — one item is rotated on, and the oldest item is rotated off. This serves to refresh the look of the front page and help viewers see resources they may have overlooked.

The other five languages are updated monthly.

When assets are highlighted, headlines and descriptions are rewritten as needed to attract more attention. Photos and graphics are also updated as needed at this time.

Meeting content

Following an MDRT meeting, the timetable for posting content is as follows:
- Video — 60 days
- Audio — 90 days

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In 2016, we began a "fast track" effort to publish select videos quickly. We were able to post seven videos from Main Platform and MDRT Speaks presentations within two days of their live presentation. In 2017 and 2018, we doubled the number of videos posted in the first month following the meeting.

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