**Strategic Planning – U.S., Top of the Table, Latin America**

**United States and Canada**

In 2018, MDRT began implementing a comprehensive plan to revitalize membership in the United States and Canada, and position MDRT as an essential, relevant and engaging resource that provides value throughout an advisor’s career. There are several initiatives underway to support this effort, including the following:

* A new marketing firm has been hired to develop fresh, compelling and creative messaging for a campaign that will be implemented beginning in late 2019.
* The second MDRT EDGE was held in New York, October 21–23, 2019, and plans for the 2020 MDRT EDGE in San Francisco are underway.
* The MDRT App is now available, and we continue to look at ways to leverage technology to deliver an app experience tailored to a member’s areas of interest and career goals.
* The MDRT Community Leaders, covering the U.S. and Canada, will work to build a sense of community among MDRT members by organizing local events and looking for opportunities to provide MDRT member speakers for company and agency meetings.
* Through the MDRT Ambassador Program, member speakers will present at company conferences, meetings and seminars on variety of different topics while integrating a strong MDRT message.
* The new MDRT Company Connect e-newsletter keeps MDRT top of mind with this important audience and highlights member benefits, relevant content and resources.
* We are establishing a process to build a prospect list and implementing automated email campaigns to reach potential members and communicate the value of membership.
* A member task force will work with staff and industry experts to gain a better understanding of the independent channel and develop a strategy to build awareness and membership in this segment.
* Since relationships are key to member retention, we will continue to look for ways to connect members, both in person and virtually, to share ideas and build camaraderie.
* The MDRT Academy and revamped MDRT Mentoring Program will help build awareness and create a pipeline for future membership growth.

A staff team meets monthly to update on progress, discuss ways to improve existing resources and brainstorm new ideas that will improve recruitment and retention in this region.

**Top of the Table Strategic Planning**

In 2018, the Top of the Table Strategic Plan Task Force was charged with developing a plan to refresh Top of the Table’s value proposition and provide more value to all members, not just those who attend the Top of the Table Annual Meeting. They also explored ways to provide more value to Court of the Table members and facilitate their conversion to Top of the Table.

As a result of their work, a number of hypotheses for increasing value and member engagement were evaluated through quantitative and qualitative member research. The following are key takeaways from the research, and an overview of next steps to address these opportunities.

* Top of the Table members face unique challenges as they transition from sales mastery to business ownership, and as they prepare a succession plan. The Business Continuation Committee, meeting in November 2019, will develop offerings to provide Top of the Table members with expertise, tools, information, coaching and networking to guide them through the process of buying or selling a business. The committee will also explore ways to deliver value for members in legacy building and succession planning.
* There is interest in a resource allowing Top of the Table members to measure their practice against those of their peers. The Top of the Table Benchmarking Committee will meet in November 2019 to identify a firm to implement a benchmarking survey, align on specific uses for the data and consider making it available to Court of the Table members.
* Cultivating relationships is key to engagement and retention, and Top of the Table should provide members with access to their network of fellow members by facilitating more virtual and in-person learning and networking opportunities. The 2019 Top of the Table Annual Meeting provided an opportunity to test this theory by building peer groups/cohorts and implementing a plan to encourage post-meeting communication among attendees.
* An onboarding campaign is also being developed for 2020 Top of the Table members to congratulate them on their accomplishment and educate them on Top of the Table-specific benefits.

These initiatives will be evaluated and refined to help us continue to drive value and build a bright future for Top of the Table.

**Latin America**

During the July Strategic Planning meeting, the Executive Committee and staff looked the current state in Latin America and the potential for membership growth in the region. MDRT currently has 1,200 members in Latin America, including 900 in Mexico and more than 200 in Brazil, with the remainder representing other Latin American countries. While there are many market-specific, translated resources available to Latin American members, the Executive Committee asked staff to develop an enhanced plan for the region to include:

* A Latin America MDRT Day in early 2021
* An effort to build a stronger regional Membership Communications Committee to help grow membership and strengthen company relationships
* The expansion of existing content and addition of new content in Portuguese
* Deploying MDRT Ambassadors to speak at MDRT Days and company meetings
* Continued evaluation of current resources to look for efficiencies and growth opportunities

The Executive Committee and staff will continue to look for ways to serve members in the region while monitoring the potential for growth.