

MDRT ALL STAFF MEETING SUMMARY

June 24, 2019

MDRT Headquarters

Park Ridge, Illinois, USA

An all-staff meeting of the Million Dollar Round Table was convened by CEO **Steve Stahr** on June 24, 2019, at 2 p.m.

ANNUAL MEETING RECAP

Stahr told staff the 2019 Annual Meeting, held June 9 to 12 in Miami Beach, Florida, was a big success and thanked everyone for making that happen. It was a new venue with a new layout and new challenges. With a record 76 staffers onsite, the key was teamwork, and everyone pitched in. The meeting flowed, it was well-run and all seemed to have a good time. We will learn more as survey results come in. Stahr acknowledged staff, including many first-timers, who were high-energy and upbeat throughout the meeting. He also thanked local police, who interacted with members and made it a fun experience. The MDRT app was well-received, well-done and easy to use, and Stahr congratulated all responsible for its development. He acknowledged MDRT's strides in technology and that we are now at the level members expect us to be.

Program Manager **Luann Burchfield** agreed Miami Beach was a refreshing change and well-received. Despite some challenges, the City, convention center, hotels, police and transportation partner 360 all pulled together and executed well. Professional Development delivered top-notch content. Annual Meeting events--including Global Council, Excalibur, Court of the Table open forum, focus groups, lunch sessions and Quarter Century Club appreciation reception--were well-executed and well-attended. There was good feedback on the new special guest reception, MetLife events, company meeting lunch and MDRT Foundation service project. Burchfield congratulated staff on new initiatives: Attendees liked the app, which replaced printed program books, and Burchfield thanked Marketing and Communications' **Taylor Conrad** and **Brittany Wright** for its development. She also thanked Program Production Coordinator **Michael Gutierrez** for managing Klik attendee tracking; Meeting Planner **Kristal Montiel** and Meetings Coordinator **Vickie Lekan** for overseeing the new pre-printed packet distribution system; and

Meeting Planner **Anne Dignan** and IT Manager **Vic Bianchini** for handling the automated Program General Arrangements evaluation system. Unofficial registration of 10,272, about 3,000 less than last year, was in line with the new Global Conference organizational strategy. Burchfield thanked all staff for their energy and efforts over the entire planning cycle. The team is finalizing details for the new Global Conference, September 1 to 4 in Sydney, Australia (current registration: 8,142). Registration is underway for the Top of the Table Annual Meeting, September 25 to 28, in Austin, Texas, and numbers are in line with last year. Priority registration opens for MDRT EDGE (October 21 to 23, New York City) July 15; registration opens to all July 29.

U.S. UPDATE

Managing Director **Barbara O'Connor** reported on MDRT's U.S. initiative to drive value and engagement. A cross-section of eight departments on the core team is committed to driving momentum in the United States. 2019 was the first year since 2013 that experienced an increase in the number of first-time members. Total U.S. membership is on track to stay flat, turning the tide toward growth in the United States. Marketing efforts are promoting MDRT value and benefits, including the app, and the team is positioning them with how we market and sell in the United States. Work is underway with marketing firms to refresh the language, messaging and advertising to tell the MDRT story and engage new members. The marketing campaign, targeting prospects around membership value, is focused on increasing the number of member ambassadors who can speak to MDRT benefits. MDRT's exhibit at the GAMA International meeting earlier this year was met with enthusiasm for the MDRT Academy and MDRT. In July, MDRT will launch a newsletter with content about MDRT's mentorship program, EDGE and other benefits and resources to get the word out. There was enthusiasm on the part of companies engaged with MDRT, prompting the team to schedule demos. The team is channeling efforts where they will have the most impact. An independent channel will provide an opportunity to understand the market better and identify benefits, including what events will help MDRT reach prospects and where we should advertise. O'Connor thanked everyone for turning membership around and increasing engagement.

MEMBERSHIP UPDATE

Director, Member Processing and Research **Tom Ensign** reported 72,050 members worldwide. MDRT is in the last stages of the online app audit. Eight hundred problem accounts received notices; only 300 problem accounts remain, with 20 rescinded as of June 24. Non-payment of 70

Diner's Club users was folded into the tally; two-thirds of those are expected to pay. The department is cleaning up about 4,000 unaffiliated records and is able to affiliate 2,800 of those. Upgrade numbers are in, including Top of the Table, and the department is managing a total 187 merges. Focus groups at the Annual Meeting provided good feedback on content, New York Life and member benefits. Director, Content Development **Katie Keuneke**'s team earned kudos for quality content that motivated participants to try new material. MDRT has received about 800 Annual Meeting survey responses so far, and is hoping to receive another 200 before turning them over to Professional Development.

STRATEGIC ENGAGEMENT UPDATE

Director, Strategic Engagement **Pam Brown** announced that, beginning with 2020, Member Engagement Manager **Wanda Dixon** and Project Coordinator **Colette Kostakos** will be charged with reinvigorating the Committee Chairs meeting and enhancing onboarding and communication. Brown thanked them and Administrative Assistant **Linda Reamer**; Project Assistant **Maureen Gallagher**; and Program Production Coordinator **Jeff Jones** for all they did to contribute to the successful Committee Chairs meeting. She updated staff on speaker Alan Morrison, who talked about ways different cultures approach and hear things differently. The team is now busy with the committee selection process and is working on the volunteer strategy, which will include exploring a new approach to evaluations that incorporates a feedback element. Brown cited Project Coordinator **Suzanne Henn** for leading the mentoring charge and asking 30 people to volunteer to be part of a 30-day test to get feedback on the communication process; launch is in September. Interested staff also are invited to provide feedback before the launch.

2020 BUDGET PROCESS

Senior Director, Finance **Laura McGrady** thanked everyone for the response to the Gold Star program, especially Accounts Payable Coordinator **Charmaine Recendez** and Staff Accountant **Jean Gibellin** for moving it forward. McGrady said there will be full payment processing this week, but no wires or ACHs the week of the Fourth of July holiday, and asked staff to plan accordingly. The 2020 budgeting process officially starts July 15 when departments will receive budget packages, and McGrady asked all to project through December 31. Packages must be returned to the Finance department by August 16. McGrady encouraged all departments to schedule meetings before the Global Conference.

HUMAN RESOURCES UPDATE

Human Resources Generalist **Naadia Chaudhry** introduced two new staff members, both in Global Markets—Sponsorship Coordinator **Mitch Donaldson** and Programs Support Coordinator **Heather Booton**. Health Week will run July 15 to 19; more information will be available soon. There is one open position, Marketing Coordinator; Chaudhry asked staff to forward referrals for the position to Human Resources.

FOUNDATION UPDATE

Executive Director, MDRT Foundation **Michele Stauff** reported results of the onsite campaign at the Annual Meeting for the Foundation's 2019 fundraising campaign. The project raised \$219,000; half of the funds will go to The Hunger Project and half will fund MDRT's Grants Program. Donors comprised 11.4 percent of meeting attendees. Stauff recognized Grants Coordinator **Angela Allegretti** as the "voice behind the grants program," and said those at the meeting were eager to see and talk with her. Stauff shared a letter from a member from South Africa, who was a beneficiary of the charity Tongaat Child & Welfare Society 53 years ago when he was a child. Stauff recognized the organization, which applied for and received a \$10,000 grant, as an example of the types of grants the Foundation funds.

STAFF STUFF

Stahr thanked staff for a successful Annual Meeting in Miami Beach, Florida, and for an amazing 12 months. The goal now is to recognize a successful July 2018 through June 2019 that incorporates the Core Value "Fun," and do something different, express appreciation, recognize the team (while also providing individual awards) and keep rewards meaningful. With that, each staff member would receive a packet at the end of the meeting to celebrate summer, including: 1) \$300 cash; 2) half-day Fridays (afternoons: June 28 July 12, July 19, July 26) or last work day preceding the designated half-day; 3) two "Take-Twos" Wednesday, July 3, and Friday, August 2; 4) four food trucks—June 24 and one each in July, August and September; and, 5) in lieu of Picnic on the Pavement this year, MDRT will defer celebration until after the Global Conference or the full meeting season to alleviate pressure associated with this year's meeting schedule.