

## MDRT ALL STAFF MEETING SUMMARY

May 19, 2020

MDRT Headquarters (and Virtual Locations)

Park Ridge, Illinois, USA

A virtual all-staff meeting of the Million Dollar Round Table was convened by CEO **Steve Stahr** on May 19, 2020, at 11:00 a.m. The meeting, held remotely, accommodated the current work-from-home (WFH) environment.

### OPENING REMARKS

Stahr shared an update on MDRT's technology strategy kick-off, emphasizing the need to focus specifically on what MDRT wants to do. This is a shared initiative with the Executive Committee, and Stahr informed senior staff last week.

Driven by a need for additional help in becoming strategy-focused, Stahr created a new Strategy department and hired new Senior Director of Strategy **Smruti Rajagopalan**, who will report directly to him. Rajagopalan -- who has worked with many associations, including MDRT, and has consulted in the corporate world -- will bring energy, creativity and strategic thinking to the process. Her role will include a focus on strategy to drive change, be sure all initiatives and timelines are met and measurements taken and addressed, ensuring that MDRT is run like a for-profit organization. She will serve as:

- 1) An internal strategy consultant to develop and implement MDRT strategies, since speed-to-market is so important; provide support on strategies and key business decisions; and work with senior staff.
- 2) A coach to help MDRT leadership think and act more strategically; define goals; identify opportunities regarding products and services both within MDRT and with external partners; and develop ways to implement them.
- 3) A change agent to help understand, manage and conquer all changes coming at us.

Rajagopalan's role will become effective July 6. Until then, she will participate in a virtual onboarding process and Zoom calls early on. Stahr asked staff to welcome her and take advantage of the skills she brings to MDRT. Stahr will forward to staff the related email he sent to Executive Staff.

### JUNE EXECUTIVE COMMITTEE MEETING

As he outlined during a recent audio message to staff, Stahr said MDRT will combine the May and July Executive Committee meetings, to be scheduled in late June. The May meeting is traditionally the business portion of the meeting; the July meeting typically focuses on the strategic plan. Executive Assistant **Gina Fadin** sent a joint agenda to Executive Staff for three-hour meetings via Zoom:

- Day 1 (June 23) will be a straight three-hour business meeting.
- Day 2 (June 26) will focus on cultural awareness. As MDRT becomes more diverse and more global, there needs to be a greater understanding in terms of leadership. Each of the eight participants, including Stahr and new Executive Committee Nominee **Greg Gagne, ChFC**, took assessments, participated in coaching calls and created goals. Each participant will have a partner; Gagne will partner with Stahr.
- The Day 3 (June 30) agenda, which is a work-in-process, will target completion of June 23 meeting content, discussion of output from the Global Council meeting and an hour on a white space topic. Staff may be asked to participate on a conference call, draft reports or otherwise help prepare for these meetings.

### GUIDELINES FOR COMING INTO THE OFFICE DURING WFH

Senior Director Human Resources **Laura Good** reviewed protocols for entering the MDRT headquarters building during this work-from-home period. Masks are mandatory and no gloves are preferred. The onsite team can retrieve needed materials, or staff can arrange to get what they need themselves. The office is cleaned after each Wednesday, once people leave. Good asked staff to let them know in advance so they can coordinate timing and days.

### Online Gift Cards

Good asked staff to register gift cards under their own names, but to ask recipients to

enter MDRT's "60068" ZIP code when they use the cards for internet purchases. Stahr thanked Good for spending the better part of this past weekend researching and implementing the gift card program, citing her time, effort, patience and helping us make a difference in someone else's life.

### Other Updates

MDRT received its insurance renewal and was significantly under budget. As a result, there will be *no change to staff benefits*. Good introduced **Kathy Li**, who joined the Emerging Media department March 2. She also gave a shout-out to the Member Relations team for their outreach to potential members who started but did not complete their membership applications; so far, the calls have resulted in 35 new members.

### WFH TECHNOLOGY UPDATE

Information Technology Senior Director **Jim Unander** shared new technologies available during the work-from-home period:

- Teams: Unander acknowledged it was great that so many already are using this technology. With changes to the configuration, users now can add external people, including vendors, for example, in their Teams. This allows them to participate in chats, Teams voice and Video calls, and see documents posted in that Team. A word of caution, however, since doing so allows access to all team chats and documents. Added participants can be removed at any time, and Unander encouraged staff to ask IT for assistance.
- Zoom 5.0 upgrade has many security updates. Passwords now are set as a default. A new prominent feature is waiting rooms; a host can set up a waiting room as soon as he or she starts the call. Unander urged users to open Zoom to download the update (click on your initials in the upper right corner of the screen and click "check for updates") before the May 26 deadline; otherwise, a prompt will appear at sign-on for the next meeting. Security has been increased to 256-byte encryption. Unander asked hosts to be sure to end meetings by clicking "end for all."
- OneDrive: Staff can opt to move to OneDrive instead of connecting to VPN each day. Unander suggested first moving any large files to the video storage drive and cleaning

up old files you no longer need. Otherwise, follow instructions on the IT SharePoint site on the ATM home page. Staff still need to go through VPN to access the ATM. Check with Network and Systems Administrator **Tammy Chan** or IT Tech Support Analyst **Marco Aguilon** for assistance.

#### MDRT FOUNDATION UPDATE

Executive Director **Michele Stauff** shared the story about the impact of an MDRT Foundation video that is launching in May as part of ALS Awareness Month. MDRT member **Tom McCoy, CLTC**, who is on the MDRT Foundation Grants Committee, announced the \$10,000 grant that was awarded to beneficiary Brigance Brigade Foundation, which benefits those suffering from ALS (Amyotrophic Lateral Sclerosis). McCoy presented the donation to MDRT member **Andre Dailey, CLTC**, who has had a long-time involvement with the organization and who applied for the grant on its behalf. Stahr sent kudos to everyone involved and thanked Stauff for sharing the experience.

Stahr thanked all staff for all everyone is doing -- pivoting so quickly with speed, grace and focus and taking these new circumstances in stride. He cited MDRT as a model organization, but that is because of staff and the MDRT culture.