Annual Meeting & Global Conference Virtual Event
Team Meeting Minutes
4.23.20

DATE: **Registration Open Date**: June 16th
August 3 – 7, 2020 – Virtual Event
August 8-28, 2020 – On Demand   **Registration Fee:** $149

Ice Breaker: **Kirsten**

Zoom protocol and Chat questions: **Kirsten**

Overall Update: **Jeanne**
- Today's team meeting will be very high level because there is still a lot to be narrowed down and decided on before moving forward
- Vendor was selected, Jeff will go into further detail
  - A few key Meeting Services staff will meet with vendor tomorrow to discuss the scope of the meeting
  - Next week an immersion meeting will take place which will be held with vendor, key Meeting Services staff and key staff from other MDRT departments
- We have learned that we should not shoehorn the Annual Meeting into a Virtual Meeting
- Tough decisions will be made, we will be as transparent as possible, hold conversations with many MDRT staff
- We are asking MDRT staff for flexibility and to be willing to change your lens as we embark on this brand new journey
- We are trying to utilize some of our vendors we have worked with for many years
- A Staff Assignments spreadsheet was created, it is a fluid doc. *Shared with minutes
- Just like with Annual Meeting, MDRT staff will be prompted to meet with Meeting Services staff and share your ideas when the time comes

Program – Update: **Jess**

- Total combined session counts & anticipated translation needs
  - **Total Sessions = 325**
  - **2 COT/TOT Sessions** *(exclusive access for COT/TOT members only?; translated subtitles into 12 languages or based on data??)*
  - **5 Cornerstone Sessions** *(translated subtitles into 12 languages)*
  - **4 Special Sessions** *(translated subtitles into 12 languages)*
  - **21 Main Platform (NM) Sessions** *(translated subtitles into 12 languages)*
  - **28 MDRT Speaks (M) Presentations** *(translated subtitles into 12 languages)*
  - **124 Focus Sessions** *(38 sessions to be translated subtitles into <u>select</u> languages)*
  - **141 ConneXion Zone Sessions**

- The 325 total sessions number is expected to change because in the next couple of weeks, we will hear back from speakers on if they are still interested in speaking
- They have been given the opportunity to bow out and be considered as priority as next year if they would like
- Jess does not expect the total sessions number to change drastically because many speakers still sound interested

- Update on the PDC process & anticipated timeline
- (Jess is currently finalizing the info below and plans to send it to Erica for translation by end of day today. Once translated, she will send it to the PDC members.)
  - **Step 1:** Identify any speakers/sessions that are <u>not</u> ideal for a virtual format.
  - **Step 2:** Captains review all assigned sessions using the virtual criteria and assign a score using the provided spreadsheet.
  - **Step 3:** Captains should confirm a primary topic and (if applicable) secondary topic for each session.
  - **Step 4:** MDRT Staff will average all scores and the final result will be a prioritized list of sessions with the top-ranking sessions as most ideal to be scheduled during the Virtual Event Week (August 3-7). PDC members will make final decision as to which speakers are scheduled during Virtual Week and what if any interactive elements will be scheduled (ie Q&A, round table discussion).

- Jess hopes to have top speakers finalized by late-May, early-June

- Speaker communication plan & requirements
  - ➢ By April 30: All Speakers will be sent new guidelines, requirements and acceptance forms to participate in a virtual presentation. Deadline to respond ~ May 11.
  - ➢ Speakers are required to modify their presentations to the new virtual guidelines:
    - o Focus Session presentations: 40 minutes or less
    - o ConneXion Zone presentations: 20 minutes or less
    - o Main Platform/Special Session (paid speaker) presentations: 30 minutes or less
    - o MDRT Speaks presentations will remain at the duration previously assigned by the MP/SS Committees
  - ➢ Program Development is not planning on changing the format or the content. Focus Sessions will still display a speaker, they are not planning to change Focus Sessions to PowerPoint presentations
  - ➢ Full speaker presentations should follow the guidelines above, additional time for live Q&A will be added to specific presentations at a later date

- Recording
  - o Meeting Services is partnering with a vendor who will help record all speakers
  - o Program Development plans to pre-record all sessions in order to leave time for editing and make the sessions look professional and limit risks associated with recording live
  - o There will possibly be some live elements, but this will be discussed and decided when Program Development starts working with vendor
  - o Will work with Meeting Services and vendor on the recording schedule
  - o Recording schedule will stagger speakers based on who is ready to record their presentation
  - o Individual PDC members in contact with the speakers will inform Program Development when the speaker is ready to record their presentation (expecting Annual Meeting speakers to be ready before Global Conference speakers)
- Translation
  - o Jess had a preliminary translation call with Eryn, Erica and some Meeting Services staff
  - o They are discussing doing translated subtitles
- Rehearsals
  - o Did not have Annual Meeting or Global Conference rehearsals this year (tried to but they kept having to reschedule)
  - o Will not have rehearsals for this meeting

Virtual Platform: **Jeff**
- Company Selection
  - o 360 Live Media will be the virtual architect, they have a lot of experience with associations and will advise us on virtual meeting best practices
  - o MeetingPlay is the tech platform that we will sub-contract through 360 Live Media
- Scoping Meeting
  - o Will take place this Friday
  - o 360, MeetingPlay and key Meeting Services staff will discuss our vision for the virtual event
- Immersion Meeting
  - o Planning to take place next week
  - o Will add additional key MDRT staff members from other departments

Registration Update   **Kristal**
- Registration Open- June 16
- Registration Fee- $149
- Registration Company
  - o Experient
  - o They have been used as the registration company for Annual Meeting
  - o Kristal and Joanne have a call with Experient later today to discuss details
- Registration Categories
- Internal FAQ
  - o Kristal is creating an internal FAQ, some questions on the FAQ will be added to the Virtual Event website
  - o If staff have any FAQ's that they feels should be added, please email Kristal

- Registration Form
  - The Virtual Event registration form is expected to mostly mirror the Annual Meeting registration form, Kristal plans to discuss the form with Experient on their call today
  - The only difference we know of now is that the Virtual Event reg form will not capture info about who's attending what session- those questions were only used in the past to determine room assignments
  - ***ACTION KRISTAL*:** Add Erica to the Experient call and discuss registration form translation needs
- Cancelations- a cancelation structure has been put together, Kristal will put it on the internal FAQ and website
- ***ACTION KRISTAL*:** confirm if attendees can register for the on-demand sessions after the Virtual Event has started
- **Registration Types:** Members, mentee, academy members, Agency Managers, Special Guest, Exec Com Special Guest, Press, Speakers, Sponsors, Suppliers, Staff.
- **Sponsor Comp Registration:**

Premier Sponsor Company	2020 Approved Members get...	Agency Managers get...
AIA China		Complimentary Registration and Exempt of having 5 members registered
Manulife-Sinochem	Complimentary Registration	
Sino-US MetLife		

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Sponsorship Opportunities　　　　　**Mary**
- Advertising
  - Virtual Event will include sponsors and advertising
  - A company is helping Mary interview previous advertisers and exhibitors
  - Receiving positive responses from the advertisers and exhibitors
  - Mary is working on an advertising pricing guide
  - Possibly putting ads on the meeting website, nothing finalized yet
  - Not confirmed if ads will require translation at this time
- Sponsors
  - Mary is talking to sponsors about doing a "commercial"- a good-will commercial about what they are doing in their countries to help others amidst pandemic

Marketing　　　　　**Taylor/Giang**
- *Virtual Event MarCom Presentation document and Look and Feel PDF sent with minutes
- When promoting meeting, it is best to use the Virtual Event identifier that has Annual Meeting on the left, Virtual Event in the middle and Global Conference on the right (what we used as our Zoom backgrounds today)
- The separate Annual Meeting Virtual Event and Global Conference Virtual Event identifiers at the top of the Virtual Event MarCom Presentation document will rarely be used, if at all

Other Key Areas:
- Emerging Media　　　　　**Wayne/Adam**
- Virtual Event website: http://imdrt.org/2020vm/index.html
- Adam received the translated virtual event website text and expects to have the translated sites up next week
- As soon as Adam is done with putting together the translated websites, he will send to Taylor who will review the sites with the vendor one last time before putting them up
- Content Development　　　　　**Michael**
- Planning on posting all Virtual Event and on-demand videos on the Resource Zone as one event
- Finance　　　　　**Mark**
- Putting together Virtual Event budget with Jeanne Malone
- Foundation　　　　　**Karen**
- As a reminder, Clean the World Foundation is our Foundation partner and they provide hygiene products for those who can't get to them
- Karen is currently re-writing the strategic plan
- ***ACTION MDRT STAFF*:** if you have creative engagement ideas for Clean the World to use with members, virtual service project ideas, etc. please share with Karen
- Global Markets　　　　　**Eryn**

- Special Guests
    - 200 – 300 on the invitation list
    - Receive comp registration for Virtual Event
    - Originally started inviting Special Guests to Annual Meeting and Global Conference, now need to re-communicate invitation to Virtual Event
    - Heather Booton is the primary point person for Special Guests.
- Agency Managers
    - Need at least 5 members from their agency to attend in order for an Agency Manager to attend Virtual Event
    - Because MDRT has not been able to deliver on all of our obligations for the sponsorship contracts in China, ExCom approved agency managers from the 3 premier sponsor companies in China to receive comp registration: AIA China, Manulife-Sinochem, and Sino-US MetLife.
    - The webpage with information about the program is in the process of being updated.
    - Traci Lobello is the primary point person for this program.
- Registration will be complimentary for Chapter staff, satellite office staff, and specific company contacts who GM approves.
- Interpretation/Translation   **Erica**
- As a reminder, please be mindful of translation and interpretation requests that need to be prioritized
- Instead of putting "ASAP", please put a date even if the date is tomorrow
- The Virtual Event will be translated/interpreted into 12 languages plus English
- English, Cantonese, Greek, Hebrew, Hindi, Indonesian, Japanese, Korean, Mandarin, Portuguese, Spanish, Thai, Vietnamese
- The Annual Meeting rule of 50 members for the same language register they will be provided interpretation, will not apply for Virtual Event
- Working on text explaining translation/interpretation at the Virtual Event and will send it to Kristal for the FAQ and website
- IT   **Jim**
- MDRT Store   **Shawn**
- Creating a virtual store with Emerging Media
- Working with t-shirt vendor to add clothing to virtual store
- Planning to feature products from speakers who have them
- Membership   **Tom/Kathy**
- 64,860 members to date
- Strategic Engagement   **Pam**
- Committee Chairs Meeting
    - Re-imaging the Committee Chairs Meeting and determining goals
    - Planning to have some live aspects and some virtual communication
    - Considering live communication be between small groups based on time zone because if everyone met at the same time some would have to be up in the middle of the night
    - Will not be the same dates as the Virtual Event
- Mentoring
    - All mentees can register for meeting regardless of any other qualifications, such as production and if the mentor is registered for the Virtual Event
    - Looking forward to giving exposure to the mentoring program at the Virtual Event and learning what capabilities the tech platform has

Team Mtgs Schedule: Zoom meeting on Thursday from 10- 11 am

May 7	July 2
May 21	July 16
June 4	July 30
June 18	