

**MEMBERSHIP COMMUNICATIONS DIVISION 1
ZONE 4 – SOUTH ASIA**

OBJECTIVE:

Actively promote MDRT membership to current and potential members worldwide. Monitor industry activities and involvement worldwide, and serve as a two-way communication link between MDRT leadership and the membership at large. Convey MDRT information to members and potential members through companies and industry associations.

PARTICIPANTS

ExCom Liaison(s):	Randy L. Scritchfield, CFP, LUTCF, Damascus, Maryland, USA Peggy Tsai, RFP, CCFP, Taipei, Taiwan
Global Council Member:	Priti Ajit Kucheria, LUTCF, CFP, Mumbai, India
Region Chair:	Manu Dhawan, New Delhi, India
Zone Chair:	Venkateswara Rao Vakalapudi, Hyderabad, India
Staff Liaison:	Mofya Kabwe

ZONE 4 CHAIR

What do you see as your biggest challenge for the upcoming year?

1) In India there are around 9,000 producers who meet the qualification and only around 3,000 MDRT registered members. The BIG challenge is how to create a team to serve and work with registered members and reaching all qualifiers who not registered then enrolling them to experience the MDRT benefits and register for their consistent growth.

1. There is potential, in India, for around 50,000 MDRT members. For this we need to create structures for making available MDRT benefits to all advisers through their companies and MCC committee and local organizations.

What support do you need from MDRT, your Region Chair and Global Council Member?

1. We want support from regional chair and global council member to advise us how to find solution to resolve the above challenge.
2. We need support from them what kind of activities we need to create with the companies during the HOP meetings to rebuild the relationship in between MDRT and the companies.
3. We need guidance from them to organize MDRT Day 2020 successfully.
4. We need support to improve MDRT registrations in India, Sri Lanka, Nepal and Bangladesh from their experience.

Additional Comments:

Summarize key points the Executive Committee and Management Council should be aware of in relation to the objective.

We are in the process of completing filling/nominating MCC Committee in a large way in India. Right now we could be able to complete company and area chairs, now we are working on creating state and local chairs we are expecting to complete in the next week.

We conducted/created some speakers from MCC committee and have done few presentations at various companies with the help of our company chairs, area and state chairs across India. This was well received by the participants. Mr. Ravi Rajpal regularly available to company to assist for arranging speakers.

MEMBERSHIP COMMUNICATIONS DIVISION 1
ZONE 4 – SOUTH ASIA

The main objective of it was to reach the MDRT members and aspiring MDRT members and convey them various resources which MDRT provides to its members for their professional growth.

However, we believe that this needs to be done by all the MCC members on regular basis.

OUR VISION AND ACTION PLAN

1. We are going to create strong MCC committee, it may be around 200 people most of them are local chairs/divisional chairs.
2. Through these MCC members, we are going to build a big network/association with all insurance advisers across India with all companies.
3. Our vision is to see that any insurance adviser/insurance company or their local managers could be able to see/liaison/attend the activity conduct but local MCC leaders and their sharing about MDRT benefits,
4. Creating the best activities like “Tea with MDRT,” “Weekend with MDRT” and “Monthly Performance with MDRT.”

Member Recognition: Recognize members whose contributions exceeded expectations. Provide examples. Identify the top three candidates to be considered as your successor.

Recognize members whose contributions exceeded expectations. Provide examples.

Priti Kucheria, Manu Dhawan, Ravi Rajpal, Ravi Kodemudi, Rahul Dhanani. Their contributions exceeded expectations.

REGION CHAIR COMMENTS:

Leadership team of Zone 4 comprising of Zone Chair, Venkat and Country Chair, Ravi Rajpal has a grand vision of creating one of the biggest MCC structure in India and has an ambitious target of taking the MDRT membership benefits to the advisor in every nook and corner of India.

The aim is to improve the engagement level and thus not only improve the retention as well as inspire prospective members to become MDRT members.

- a. The single most driving factor is going to be study circle. This needs to be communicated to MCC very effectively.
- b. With over 100 MCC members, the communication strategy needs to be decided with MCC members, MDRT members and life insurance companies.
- c. To make a small beginning, I hereby recommend sending the *Round the Table* magazine to a minimum of three key persons in every organization: CEO, sales head and training head.
- d. Action plan for current month and feedback on previous month over monthly conference call must be initiated for implementation of action plan. Massive action is needed.
- e. Measurement mechanism must be created.
- f. Had discussions with both Venkat and Ravi Rajpal over issues like appointment of MCC members, planning for MDRT Day and also **“put lot of emphasis on working as a team.”**

MEMBERSHIP COMMUNICATIONS DIVISION 1
ZONE 4 – SOUTH ASIA

GLOBAL COUNCIL MEMBER COMMENTS:

- Ambitious vision to have 200 MCC members so that engagement through study circles can happen with the farthest members of India and to have three MDRT Days in four months.
- Zone Chair Venkat seems to have a great vision, but from what I have been hearing there is no action plan in coordination with the team. The MCC committee nominations for local chairs was not in place right until two days ago. Seeks guidance but is pretty much adamant on how he wants things to be done. I am hopeful this leadership experience will help him emerge as a team player. I see no mention of other countries (especially Sri Lanka that is growing well) in his report.
- Country Chair Ravi is blossoming as a Leader! I see great potential in him. He has networked with all companies except LIC which is the biggest company because the zone chair feels no private company MCC member should get in touch with LIC management.
- All in all, South Asia has great potential, I am sure there are teething problems when a new committee and structure is formed.

MCC Business Plan Reporting Template

Country: INDIA

2019-2020 Organizational Year (1 September 2019 – 31 August 2020)

Please complete for each of the primary activities that you are planning for the upcoming organizational year. This form will provide MDRT and MCC leadership with the knowledge and understanding of the work that you and your Each Chair is asked to establish a maximum of three activities for implementation (please utilize tabs below).

Activity #1

<p>*ACTIVITY:</p>	<p align="center"><u>1st REPORT due 30 September, 2020</u></p> <p>(1). EVENTS IN COMPANIES TO SHARE MDRT BENEFITS TO MEMBERS AND PROBABLES (2) ALL MCC MEMBERS TO TAKE UP MENTORING AND BE A PART OF STUDY GROUPS (3) TO CONDUCT MDRT DAY IN THREE CITIES IN FEB/ MARCH 2020 (4) COMPANY SPECIFIC MDRT DAY IN KOTAK / ODELWISSE / MAXLIFE / BIRLA / PNB METLIFE / BHARATI AXA / HDFC / LIC / INDIA FIRST AND WILL ENCOURAGE MORE COMPANIES TO PARTICIAPTE IN THIS (5) HAPPY HOUR GATHERING (6) ENGAGING WITH MCC TEAM LOCATED IN DIFFERENT CITIES AND STATES TO CARRY OF THE ACTIVITIES AS MENTIONED ABOVE</p>
<p>*Pillar (Identify the pillar that this activity supports)</p>	<p align="center">GROWTH</p> <p><input type="radio"/> RETENTION</p> <p><input checked="" type="radio"/> ENGAGEMENT</p>
<p>*DESCRIPTION (Provide a brief description of activity planned):</p>	<p>ALL COMPANY CHAIRS WILL BE ALIGNING WITH THEIR MCC TEAM AND SUPPORT SYSTEMS TO EDUCATE ON THE WEBSITE USE/AND FOR THE ASPIRANTS ALSO TO EXPLORE ALL THEY CAN GET . WITH THIS ACTIVITY THEY KNOW THAT MDRT IS A 365 DAY EVENT.</p> <p><input checked="" type="checkbox"/> WE HAVE STARTED TO CREATE A CORE TEAM (FOR SUPPORTING ON STUDY GROUP AND MENTORING WITH MATERIALS) WHO WILL KEEP ON ENLARGING THEM INDIVIDUAL TEAMS SO THAT THERE ARE LEADERS AND SUCCESSORS PRESENT IN EACH TEAM .</p> <p>COMPANY CHAIR WILL INTERACT WITH THEIR COMPANIES HEAD OF AGENCY EVERY QUARTER TO SEE HOW THEY CAN BE OF SUPPORT IN THE COMPANIES GOALS AND VISION .[GROWTH BY BUILDING A STRONGER TEAM . BY ADDING VALUE EACH AND EVERY ADVISOR WE CAN KEEP</p>
<p>*MDRT STRATEGIC PLATFORM SUPPORTED (Identify platform(s):</p>	<p align="center">CELEBRATING ACHIEVEMENT</p> <p><input type="checkbox"/> GUIDED DEVELOPMENT</p> <p><input checked="" type="checkbox"/> STRONGER TOGETHER</p> <p><input type="checkbox"/> TRANSFORMATIVE PRODUCTIVITY</p>
<p>*SCHEDULED DATE(s): When will the activity occur</p>	<p>MDRT INDIA EVENT WILL BE IN FEB 2020</p> <p>THE OTHER LOCAL EVENTS WE WILL SHARE ON XL AS THIS LIST IS EXHAUSTIVE</p>

<p>*IMPLEMENTATION/TIMELINE (Outline the process/steps planned, timeline and personnel (staff, vender and member volunteer) resources required)</p>	<p>VENDER FOR THE MDRT INDIA DAY IS IN PROCESS , SAJID IS BEING KEPT IN LOOP FOR THIS . REGARDING STEPS AND TIMELINES FOR OTHER ACTIVITIES MENTIONED ABOVE IS ON GOING. WE HAVE ASKED THE AGENCY HEAD OF COMPANIES TO SHARE THEIR LARGE MEETING SCHEDULES WHICH ARE HELD QUARTERLY / SEMI ANNUAL AND ANNUALLY . SO THAT WE CAN SHARE MDRT BENEFITS DURING SUCH MEETINGS . AS OF NOW MOST COMPANIES HAVE SHOWN VERY POSITIVE RESPONSE.</p>
<p>*PRIMARY TARGET MARKET/AUDIENCE (member/non-member, specific demographics such as region, age, membership years, membership type, etc.):</p>	<p>PRIMARY MARKET IS THE MEMBERS FIRST REGION WILL BE METROS, LATER WE EXPAND TO SMALLER TOWNS . PRIMARY TARGET TO IMPACT IN THE MEMBERS ARE THE 1st/2nd/3rd TIMERS . BY TAKING SUPPORT OF LIFE MEMBERS WHILE THE MEMBERS ARE ADDRESSED THERE WILL BE SELECTED ASPIRANTS WHO WILL ALSO BE ADDRESSED.</p>
<p>SECONDARY TARGET MARKET/AUDIENCE:</p>	<p>DURING THE ACTIVITIES THE COMPANY TRAINERS AND APPOINTED SALES/DEVELOPMENT MANAGERS WILL ALSO BE TARGETED</p>
<p>*GOAL & SUCCESS MEASUREMENTS (identify specific, quantitative, measurable success goals):</p>	<p>SUCCESS MEASURE WE WILL SEE WITH THE NUMBER OF STUDY GROUPS FORMED AND UPDATE THIS EVERY MONTH SIMILARLY WE WILL TAKE COUNT FOR MENTORING EVERY QUARTER BY END OF MARCH WE WILL KNOW THE % INCREASE IN MDRT. OUR TARGET IS TO INCREASE THE PERCENTAGE 1st/2nd/3rd YEAR QUALIFIERS COMING BACK UP BY 100% IN ADDITION TO ADD 20% FIRST TIME MDRT FROM THE LIST OF ASPIRANTS</p>
<p>*NEEDS ANALYSIS (Please share quantifiable data that supports the request)</p>	<p>AS PER MDRT DATA APPROX 20% OF THE 1st/2nd/3rd TIMERS REGISTER AGAIN, WHILE 80% DROP OUT. THIS WE INTEND TO INCREASE TO 40% FROM 20%.</p>

<p>*BUDGET:</p>	<p><input type="checkbox"/> NONE</p> <p><input checked="" type="checkbox"/> Request MCC Budget (Outline budgets needs and rational; reach out to your Zone and Region Chair to submit budget request)</p> <p><input type="checkbox"/> Request Additional Budget (Outline budgets needs and rational; reach out to your Zone and Region Chair to submit budget request)</p>
<p>*OUTLINE OF BUDGET NEEDS (if requested):</p>	<p>MAINLY FOR VIDEO ZOOM CALLS AND CREATING CONFERENCE ID. SINCE THE ADVISORS ARE SPREAD ALL ACROSS THE COUNTRY. (approx cost USD 20 PER MONTH , TOTAL USD 250 TO 300)</p> <p>ONE VISIT TO AT LEAST FIVE STATES DURING THE TENURE OF 19/20 BY ZONE CHAIR AND COUNTRY CHAIR .. COST OF TRAVEL TO 6 CITIES - DELHI / BANGALORE - HYDERABAD - CHENNAI / KOLKATTA / MUMBAI (ZONE CHAIR AND COUNTRY CHAIR WILL TRAVEL) (AIR COST IS 1,50,000 + ROOM COST 1,00,000 + FOOD AND LOCAL TRAVEL IS 50,000). IN ADDITION IS 30,000 FOR ZONE CHAIR TO VISIT MUMBAI TOTAL IS RS 3,30,000</p>
<p>WHAT SUPPORT DO YOU NEED FROM MDRT:</p>	<p>MENTOR MENTEE PROGRAMME AND STUDY GROUP - GUIDELINES & MATERIALS ASLO MDRT TO CONNECT US WITH A FEW MCC MEMBERS WHO HAS BEEN VERY SUCCESSFUL WITH THE MENTOR MENTEE AND STUDY GROUP. TO SHARE WITH US WHAT ACTIVITIES ARE BEING IMPLEMENTED IN OTHER COUNTRIES. THIS WILL BROADEN OUR SCOPE OF WORK.</p>
<p>*List alternate approaches that were considered and reasons for choosing proposed activity.</p>	<p>AS OF NOW THIS HAS BEEN THE ONLY APPROACH WE HAD PLANNED WHEN WE MET YOU ALL IN CHICAGO. SURELY WE WILL KEEP EVOLVING IN OUR ACTIVITIES AS TIME GOES BY.</p>

MCC Business Plan Reporting Template

Country: INDIA

2019-2020 Organizational Year (1 September 2019 – 31 August 2020)

Activity #2

Please complete for each of the primary activities that you are planning for the upcoming organizational year. This form will provide MDRT and MCC leadership with the knowledge and understanding of the work that you and your Each Chair is asked to establish a maximum of three activities for implementation (please utilize tabs below).

	<u>1st REPORT due 30 September, 2020</u>
*ACTIVITY:	
*Pillar (Identify the pillar that this activity supports)	<input type="radio"/> GROWTH <input type="radio"/> RETENTION <input checked="" type="radio"/> ENGAGEMENT
*DESCRIPTION (Provide a brief description of activity planned):	MCC ENGAGEMENT TO FORM STUDY GROUPS AND PLAN TEA WITH MDRT EVENTS
*MDRT STRATEGIC PLATFORM SUPPORTED (Identify platform(s):	<input type="checkbox"/> CELEBRATING ACHIEVEMENT <input type="checkbox"/> GUIDED DEVELOPMENT <input checked="" type="checkbox"/> STRONGER TOGETHER <input type="checkbox"/> TRANSFORMATIVE PRODUCTIVITY
*SCHEDULED DATE(s): When will the activity occur	LAST WEEK OF OCTOBER FOR STUDY GROUP AND THIRD WEEK OF NOVEMBER FOR EVENTS " TEA WTH MDRT"
*IMPLEMENTATION/TIMELINE (Outline the process/steps planned, timeline and personnel (staff, vender and member volunteer) resources required)	<p>WITHIN 3 MONTHS EACH MCC MEMBER WILL BE PART OF A STUDY GROUP AND WOULD HAVE ENROLLED TWO MORE MDRT MEMBERS TO HAVE FORMED SUCH STUDY GROUPS</p> <p>ALSO DURING SUCH MEETINGS, A LIST OF MDRT MEMBERS WILL BE SHORTLISTED WHO ARE READY TO MEET AND SHARE WITH OTHER MDRT MEMBERS ABOUT MDRT MEMBERSHIP BENEFITS AND SHARE ON PRACTICE MANAGEMENT</p>

<p>*PRIMARY TARGET MARKET/AUDIENCE (member/non-member, specific demographics such as region, age, membership years, membership type, etc.):</p>	<p>MCC MEMBERS AND MDRT MEMBERS</p>
<p>SECONDARY TARGET MARKET/AUDIENCE:</p>	<p>20% OF THE STUDY GROUPS TO HAVE ASPIRANTS</p>
<p>*GOAL & SUCCESS MEASUREMENTS (identify specific, quantitative, measurable success goals):</p>	<p>20 STUDY GROUPS AND IDENTIFYING 25 SPEAKERS AMONGST MEMBERS. 40% OF THE ASPIRANTS WHO ARE PART OF MDRT GROUP WILL BECOME MDRT QUALIFIERS AND WITH THE EVENT OF TEA WITH MDRT USAGE OF RESOURCE ZONE WILL INCREASE. MDRT MEMBERS WILL INCREASE THEIR GOALS TO COT AND TOT</p>
<p>*NEEDS ANALYSIS (Please share quantifiable data that supports the request)</p>	<p>10 EVENTS OF TEA WITH MDRT AND APPROX 100 MEMBERS SPREAD ACROSS DIFFERENT STUDY GROUPS</p>
<p>*BUDGET:</p>	<p><input type="checkbox"/> NONE</p> <p><input checked="" type="checkbox"/> Request MCC Budget (Outline budgets needs and rational; reach out to your Zone and Region Chair to submit budget request)</p> <p><input type="checkbox"/> Request Additional Budget (Outline budgets needs and rational reach out to your Zone and Region Chair to submit budget request)</p>
<p>*OUTLINE OF BUDGET NEEDS (if requested):</p>	<p>ONLY COST WOULD BE FOR ZOOM CALLS + TRAVLE COST WILL BE COVERED IN ACTIVITY ONE</p>

WHAT SUPPORT DO YOU NEED FROM MDRT:	IN PROVIDING MATERIAL FOR STUDY GROUPS AND SHARE WHAT OTHER COUNTRIES ARE CONDUCTING THE EVENT " TEA WITH MDRT"
*List alternate approaches that were considered and reasons for choosing proposed activity.	MAJOR REASON CHOSEN IS TO ENCOURAGE SHARING

MCC BUSINESS PLAN – SRI LANKA	2020 Organizational Year	September 2019 – August 2020
*ACTIVITY	Conduct MDRT Day for the MDRT members and aspirants of the top 5 insurance companies 1. Ceylinco Life 2. Union Assurance 3. AIA 4. Softlogic Insurance 5. Janashakthi 6. One event for all other Insurance Companies	
*Pillar (Identify the pillar that this activity supports)	<input checked="" type="checkbox"/> Growth <input type="checkbox"/> Retention <input type="checkbox"/> Engagement Sri Lanka MDRT membership count for 2019 is 510. Our aim is to increase it to 700 in 2020.	
*DESCRIPTION (Provide a brief description of activity planned)	Country chair will coordinate with each company chair and the MDRT Day will be held for the particular company. We will focus on sharing experience and good practice to motivate the MDRT members and aspirants.	
*MDRT STRATEGIC PLATFORM SUPPORTED	<input checked="" type="checkbox"/> Celebrating achievement <input checked="" type="checkbox"/> Guided development <input type="checkbox"/> Stronger together <input type="checkbox"/> Transformative productivity	
*SCHEDULED DATES (When will the activity occur)	1. 8 th November 2019 – Ceylinco Life 2. 17 th July 2020 – Union Assurance 3. 11 th January 2020 – AIA 4. 15 th May 2020 – Softlogic Insurance 5. 13 th March 2019 – Janashakthi Insurance 6. 14 th August 2020 – For all other Insurance companies	
IMPLEMENTATION / TIMELINE Outline the process / steps	1. Will obtain the list of MDRT members and	

	<p>aspirants from each of the 5 companies</p> <ol style="list-style-type: none"> 2. Venue will be the training hall of each company 3. Will draw an agenda on the proceedings for the day 4. Will forward the agenda to MDRT staff liaison for approval and verification 5. Will communicate to MDRT members and aspirants through company chairs of each company 6. Will prepare the training and promotional material locally. 7. At the event list of attendees with their contact details will be obtained and sent to MCC staff liaison 8. Feedback will be obtained from each attendee and will be shared with MCC liaison. 9. Each company will bear the cost for food, beverage and other logistics. Will seek no budget from MDRT. 	
PRIMARY TARGET MARKET / AUDIENCE	200 members for each event and total of 1200 members and aspirants.	
SECONDARY MARKET / AUDIENCE	Sales Managers / Marketing Staff and Training Dept staff.	
WHAT SUPPORT DO YOU NEED FROM MDRT	Material for presentation, Brochures, Video Clips	
GOAL AND SUCCESS MEASUREMENT	To facilitate in creating new networks and increase productivity. Aspirants to gain by sharing experience of successful MDRT members and be motivated.	

BUDGET	<p>----X----- None</p> <p>-----Request MCc Budget (Please outline budget needs)</p>	
OUTLINE OF BUDGET NEEDED (IF REQUESTED)	NONE	

MEMBERSHIP COMMUNICATIONS DIVISION 1
ZONE 9 – CARIBBEAN

OBJECTIVE:

Actively promote MDRT membership to current and potential members worldwide. Monitor industry activities and involvement worldwide, and serve as a two-way communication link between MDRT leadership and the membership at large. Convey MDRT information to members and potential members through companies and industry associations.

PARTICIPANTS

ExCom Liaison(s):	Randy L. Scritchfield, CFP, LUTCF, Damascus, Maryland, USA Peggy Tsai, RFP, CCFP, Taipei, Taiwan
Global Council Member:	Priti Ajit Kucheria, LUTCF, CFP, Mumbai, India
Region Chair:	Herman Colin, LUTCF, CLI, Estado De Mexico, Mexico
Zone Chair:	Gail Singh, FCCA, El Dorado, Trinidad and Tobago
Staff Liaison:	Sara Estrella

ZONE 9 CHAIR

What do you see as your biggest challenge for the upcoming year?

Balancing my time to support the goals (growth and retention via engagement) for Jamaica and Trinidad (new country chair) and fostering MDRT awareness to achieve country chair status for Bahamas, Belize, Barbados and Cayman Islands. Add Dominica to the list of MDRT qualifiers for 2020/2021.

Getting unfinished trips done from last MDRT year together with visiting all the islands at least once a year to get MDRT global presence felt.

Monitoring the country chairs to ensure that developments over the past years are continued seamlessly and supported to add value to what was already built.

What support do you need from MDRT, your Region Chair and Global Council Member?

- Strong liaison and support with events e.g. MDRT Days for all countries
- MDRT speakers at the MDRT Days
- MDRT support for engagement strategies
- Support for attendance to Annual Meeting
- Ideas for growth and retention/ MDRT Day coordination

Additional Comments:

There is much potential in the Caribbean. Growth and retention WILL be achieved via engagement.

A lot has to be done in each island and strong volunteers are required – Selfless persons who live MDRT and love people.

Member Recognition: Recognize members whose contributions exceeded expectations. Provide examples. Identify the top three candidates to be considered as your successor.

MEMBERSHIP COMMUNICATIONS DIVISION 1
ZONE 9 – CARIBBEAN

REGION CHAIR COMMENTS:

What I've seen in many countries is that one or two companies are the leaders with the number of MDRT members and that there is two or three additional companies with the same number of agents that qualified for MDRT, but that have not seen the benefit of being an MDRT Member or as MCC. We have not known how to successfully target the managers of the advisors who make the decision to engage them and promote MDRT membership to their agents.

Last month, Nehemiah and Sara were able to talk to high-ranking people from four companies in Jamaica. That it was a first and a big step, which we must replicate in all the countries that are part of the Caribbean area.

Great efforts are being made to have MDRT Days and MDRT meetings so that more advisors can see the benefits of being part of this amazing organization.

I have a lot of confidence in both the zone chair and country chairs and I think they will make significant changes this year.

GLOBAL COUNCIL MEMBER COMMENTS:

- Need MDRT speakers at their MDRT Days
- Seeking ideas for growth and retention
- Gail getting unfinished trips done from last MDRT year and visiting all the islands
- No successor on the cards yet
- Region chair very satisfied with the way zone and country chairs are going about their business

MCC Business Plan Reporting Template

Country: Jamaica

2019-2020 Organizational Year (1 September 2019 – 31 August 2020)

Activity #1

Please complete for each of the primary activities that you are planning for the upcoming organizational year. This form will provide MDRT and MCC leadership with the knowledge and understanding of the work that you and your Each Chair is asked to establish a maximum of three activities for implementation (please utilize tabs below).

<u>1st REPORT due 30 September, 2020</u>	
*ACTIVITY:	MDRT Country workshop
*Pillar (Identify the pillar that this activity supports)	<input type="radio"/> GROWTH <input type="radio"/> RETENTION <input checked="" type="radio"/> ENGAGEMENT
*DESCRIPTION (Provide a brief description of activity planned):	Members/aspitant engagement and to give the necessary information/tool so growth can take place and to conduct a workshop for a specific amount of members/aspitant to energize and empower. <input type="checkbox"/>
*MDRT STRATEGIC PLATFORM SUPPORTED (Identify platform(s):	CELEBRATING ACHIEVEMENT <input checked="" type="checkbox"/> GUIDED DEVELOPMENT <input type="checkbox"/> STRONGER TOGETHER <input checked="" type="checkbox"/> TRANSFORMATIVE PRODUCTIVITY
*SCHEDULED DATE(s): When will the activity occur	This will take place January 2020

<p>*IMPLEMENTATION/TIMELINE (Outline the process/steps planned, timeline and personnel (staff, vender and member volunteer) resources required)</p>	<p>Will have an action/planned meeting with company heads in October 2019 this will enable us to have the date in January confirmed. Company local chairs and members will be used for registration plus to give hand outs. Will be requesting a speaker from MDRT by October 2019.</p>
<p>*PRIMARY TARGET MARKET/AUDIENCE (member/non-member, specific demographics such as region, age, membership years, membership type, etc.):</p>	<p>Aspirant, mentee, members of MDRT from all over Jamaica target age will be between 25 to 50.</p>
<p>SECONDARY TARGET MARKET/AUDIENCE:</p>	<p>Companies heads (building relationship)</p>

<p>*GOAL & SUCCESS MEASUREMENTS (identify specific, quantitative, measurable success goals):</p>	<p>Goals is to engage members and non members plus aspirant and to provide information that will develop their skills. This will be measured by survey/questionnaire so that monthly tracking can be done.</p>
<p>*NEEDS ANALYSIS (Please share quantifiable data that supports the request)</p>	<p>12 Sagicor, 10 Guardian, 5 NCB, 5 Scotiabank, 5 Chancellor, 5 Lawe insurance, 4 JN Life, 2 Sspectrum Insurance Broker and 2 Pinnacle Insurance Broker Grand total of 50</p>
<p>*BUDGET:</p>	<p><input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p>
<p>*OUTLINE OF BUDGET NEEDS (if requested):</p>	<p>Approximate Budget \$1500.00 USD which work out to \$30 USD per person that will include lunch and venue.</p>
<p>WHAT SUPPORT DO YOU NEED FROM MDRT:</p>	<p>Speakers some handouts CD and DVD and some guidance/idea in relation to breakout sessions.</p>

***List alternate approaches that were considered and reasons for choosing proposed activity.**

My alternate approach will be MDRT branch visit right across Jamaica. The reason for the workshop because I believe members/aspirant and non-members need to have a more closer relationship; this will enable more participation with MDRT.

MCC Business Plan Reporting Template
Country: TRINIDAD AND TOBAGO JENNIFER KHAN
2019-2020 Organizational Year (1 September 2019 – 31 August 2020)

Activity #1

Please complete for each of the primary activities that you are planning for the upcoming organizational year. This form will provide MDRT and MCC leadership with the knowledge and understanding of the work that you and Each Chair is asked to establish a maximum of three activities for implementation (please utilize tabs below).

1st REPORT due 30 September, 2020	
*ACTIVITY:	To promote and grow MDRT membership. To develop an MDRT day re companies. To establish a quarterly meeting with all company chairs and mentees.
*Pillar (Identify the pillar that this activity supports)	<input checked="" type="radio"/> GROWTH 30% <input type="radio"/> RETENTION 100% <input type="radio"/> ENGAGEMENT
*DESCRIPTION (Provide a brief description of activity planned):	Greater involvement of managers. Create MDRT Think Tank groups within each company. MDRT Quarterly tracking devices. Identify mentors to work with mentees who have the potential to qualify. <input type="checkbox"/> Bringing the awareness of MDRT and membership benefits. Enabling members to achieve and surpass their personal and professional goals by becoming more productive.
*MDRT STRATEGIC PLATFORM SUPPORTED (Identify platform(s):	CELEBRATING ACHIEVEMENT <input checked="" type="checkbox"/> GUIDED DEVELOPMENT <input checked="" type="checkbox"/> STRONGER TOGETHER <input checked="" type="checkbox"/> TRANSFORMATIVE PRODUCTIVITY

<p>*SCHEDULED DATE(s): When will the activity occur</p>	<p>1) December, 2019 Implementing strategies with company chairs. review in November 2019 with company chair. DAY March 2020 meeting December 2019, March 2020, June 2020</p> <p style="text-align: right;">Progress 2) MDRT Quarterly</p>
<p>*IMPLEMENTATION/TIMELINE (Outline the process/steps planned, timeline and personnel (staff, vender and member volunteer) resources required)</p>	<p>MDRT Day Carded MARCH 2020 Re MDRT Day 2020</p> <ol style="list-style-type: none"> 1. Have all company executives on board 2. Identify location 3. Put together an agenda with Zone Chair and Company Chairs 4. Request the help of the marketing department of each company to assist in the planning stages 5. Send agenda to MDRT staff liaison for approval 6. Get all company chairs on board to give information re how many aspirants, qualifying members, life members, previous qualifying members and potential qualifying aspirants and members 7. Email invitations with an RSVP deadline date to all involved 8. Contact MDRT re speaker request form and handouts to be distributed to MDRT members and non members.
<p>*PRIMARY TARGET MARKET/AUDIENCE (member/non-member, specific demographics such as region, age, membership years, membership type, etc.):</p>	<p>Targeting Aspirants, Non-members and previous qualifying members.</p>
<p>SECONDARY TARGET MARKET/AUDIENCE:</p>	

<p>*GOAL & SUCCESS MEASUREMENTS (identify specific, quantitative, measurable success goals):</p>	<p>1. To increase membership. 2. To increase a greater awareness within all the insurance companies within Trinidad and Tobago in order to achieve a 30% and 100% retention. 3. Will conduct a survey via a feedback slip at the end of the meeting 4. Will monitor the activities within each company via the company chairs.</p>
<p>*NEEDS ANALYSIS (Please share quantifiable data that supports the request)</p>	
<p>*BUDGET:</p>	<p><input type="checkbox"/> NONE <input checked="" type="checkbox"/> Request MCC Budget (Outline budgets needs and rational; reach out to your Zone and Region Chair to submit budget request) <input type="checkbox"/> Request Additional Budget (Outline budgets needs and rational; reach out to your Zone and Region Chair to submit budget request)</p>
<p>*OUTLINE OF BUDGET NEEDS (if requested):</p>	<p>Provide tea plates for 100 attendees</p>
<p>WHAT SUPPORT DO YOU NEED FROM MDRT:</p>	<p>MCC member speaker or an ambassador</p>

***List alternate approaches that were considered and reasons for choosing proposed activity.**

- 1) Looking to grow membership within all the insurance companies in Trinidad and Tobago.
- 2) To bring the awareness to new members via the mentorship program

MEMBERSHIP COMMUNICATIONS DIVISION 1 ZONE 10 – EUROPE

OBJECTIVE:

Actively promote MDRT membership to current and potential members worldwide. Monitor industry activities and involvement worldwide, and serve as a two-way communication link between MDRT leadership and the membership at large. Convey MDRT information to members and potential members through companies and industry associations.

PARTICIPANTS

ExCom Liaison(s):	Randy L. Scritchfield, CFP, LUTCF, Damascus, Maryland, USA Peggy Tsai, RFP, CCFP, Taipei, Taiwan
Global Council Member:	Priti Ajit Kucheria, LUTCF, CFP, Mumbai, India
Region Chair:	Mathew Thomas Fogarty, CFP, Dip FP, Moorabbin, Victoria, Australia
Zone Chair:	Anthony Matthew Jones, Wexford Ireland
Staff Liaison:	Lena Polishuk

Anthony Jones – Zone Chair.

Summary:

Israel, Greece and Ireland all completed their reports before the deadline of the 5th of October. Unfortunately the UK did not respond on time and the UK chair who had nominated another to complete it, had to do it himself and this was received late on the 11th of October. Hence why this report has been delayed.

The prevalent pillars being concentrated on in Europe is growth and member engagement, with retention being the third priority. The general feeling throughout the zone is that once a new member attends the meeting(s) and utilises resources available, retention is generally high. The hard part is increasing numbers and this is an area of opportunity in my opinion. My country chairs agree wholeheartedly with me.

Activities Planned, or already actioned.

UK

0.5% of advisers in the UK are MDRT members – hence huge opportunity.
PFS/MDRT day Birmingham – September. Fantastic response – 150 advisers present – most non-members and 223 on the live stream. 536 individual responses looking for further details on 2020 membership.

Zone chair flew to Birmingham to support MCC UK on their PFS MDRT day.
56 more people interested from ‘Openwork’ conference where UK MCC had a MDRT stand.
Future event: “Solidus” Conference 6th November. 100 delegates. We hope there will be further interest here.

Other conferences have agreed to have MDRT stand in 2020. E.g. “Openwork” event. I will update as they occur.

Follow up with all interested parties delegated to MCC committee.

Greece

Retention. Every month from Oct 2019 to July 2020 unique insights and practices will be shared with current MDRT members and up to 80 aspirants.

MEMBERSHIP COMMUNICATIONS DIVISION 1 ZONE 10 – EUROPE

Study groups planned with 10 participants each bringing a name of a prospect member each time. Study groups will be held through the ZOOM app. Feedback from the study groups will be shared one day prior to MDRT day Greece.

MCC meetings – Two online meetings already held. All members enthusiastic to follow Karolos lead. Submission to MDRT regarding holding a MDRT day in Greece in February 2020. Awaiting clearance from ExCom.

Zone chair has emailed country chair to encourage a fantastic start to his year and accepted invitation to speak at proposed Greece MDRT day in February 2020.

Targeting aspirants and non-members, the goal is to get over 200 aspirants as well as existing MDRT members from Greece and Cyprus.

Chair is requesting an MDRT Ambassador speaker plus headquarters staff liaison to be present.

Israel

Following on from MDRT MCC meetings, the members of the team have been given individual tasks so each has an area of responsibility. The aim also is to bring at least 50 members to Anaheim in 2020. Recruit new members through meeting marketing managers of insurance companies. The aim is to increase membership numbers by 20% this coming year. Israel is also undertaking an MDRT day which was very successful in 2019. MDRT speakers requested and the hope is to enlarge MDRT numbers in Israel and retain existing members. The Israel MCC chair had a very good year in 2019 and is eager to follow up in 2020.

Ireland

Ireland hopes to reintroduce an MDRT Day to the country but are facing considerable challenges locally to achieve this. “Soft skills” are not an area the ICB look favourably on as its sole focus is examination education. This is work in progress to re-educate about what MDRT stands for. Goal is that each MCC member will have at least one new or returning MDRT member for Anaheim.

All MCC members to report back individually at MCC meetings. First Ireland Meeting 11th October and the plans will be rolled out. Ireland target is 100 members by 2020. Ireland country chair very enthusiastic and is in touch with zone chair often. I expect great results here going forward again for 2019/20.

Challenges

I think our main challenge is succession in some countries. We have great succession already in place in Greece but the other three countries are not as clear. The UK seemed to be sorted as regards its succession to Gary’s fine work, however, I have fresh concerns due in no small part to the total lack of communication regarding the report which had been tasked to the presumptive successor. I am hoping that there is a clear reason for this and that it was a one off. All country chairs are working closely with me to overcome previous challenges and achieve our aims especially in member growth area.

Opportunities.

All countries realise the opportunities for growth and engagement. It’s hoped that retention will stabilise as engagement increases.

MCC Business Plan Reporting Template

Country: GREECE
 2019-2020 Organizational Year (1 September 2019 – 31 August 2020)

Activity #1

Please complete for each of the primary activities that you are planning for the upcoming organizational year. This form will provide MDRT and MCC leadership with the knowledge and understanding of the work that you. Each Chair is asked to establish a maximum of three activities for implementation (please utilize tabs below).

1st REPORT due 30 September, 2020	
*ACTIVITY:	WEBINAR
*Pillar (Identify the pillar that this activity supports)	<input type="radio"/> GROWTH <input checked="" type="radio"/> RETENTION <input type="radio"/> ENGAGEMENT
*DESCRIPTION (Provide a brief description of activity planned):	To share with MDRT Members and 80 Aspirants unique insights and practices.
*MDRT STRATEGIC PLATFORM SUPPORTED (Identify platform(s):	<input type="checkbox"/> CELEBRATING ACHIEVEMENT <input checked="" type="checkbox"/> GUIDED DEVELOPMENT <input type="checkbox"/> STRONGER TOGETHER <input checked="" type="checkbox"/> TRANSFORMATIVE PRODUCTIVITY
*SCHEDULED DATE(s): When will the activity occur	Every month from October 2019 until July 2020. Dates to be advised.

<p>*IMPLEMENTATION/TIMELINE (Outline the process/steps planned, timeline and personnel (staff, vender and member volunteer) resources required)</p>	<p>a. Each month a different member of the MCC will organize the event. b. Each member can invite two aspirants with the obligation to present their productivity report. c. There would be translation in Greek language.</p>
<p>*PRIMARY TARGET MARKET/AUDIENCE (member/non-member, specific demographics such as region, age, membership years, membership type, etc.):</p>	<p>All Members</p>
<p>SECONDARY TARGET MARKET/AUDIENCE:</p>	<p>Aspirants</p>

<p>*GOAL & SUCCESS MEASUREMENTS (identify specific, quantitative, measurable success goals):</p>	<p>The 42 members that are registered today to re-register for 2020</p>
<p>*NEEDS ANALYSIS (Please share quantifiable data that supports the request)</p>	<p>In the last five years the average number of members has been 42 and almost 60% are re-registering . By giving direct value to the members we will raise the percentage</p>
<p>*BUDGET:</p>	<p><input checked="" type="checkbox"/> NONE</p> <p><input type="checkbox"/> Request MCC Budget (Outline budgets needs and rational; reach out to your Zone and Region Chair to submit budget request)</p> <p><input type="checkbox"/> Request Additional Budget (Outline budgets needs and rational; reach out to your Zone and Region Chair to submit budget request)</p>
<p>*OUTLINE OF BUDGET NEEDS (if requested):</p>	<p>none</p>
<p>WHAT SUPPORT DO YOU NEED FROM MDRT:</p>	<p>none</p>

***List alternate approaches that were considered and reasons for choosing proposed activity.**

Each member is choosing two aspirants, in that way the member participates to the development of the network and also add value to his/her colleagues. I have selected this activity because right now the 31% of the members are from all the regions of Greece, in that way we will expand. Also by using the technology we save time and we familiarize our members with the latest technological tools.

MCC Business Plan Reporting Template

Country: Greece
2019-2020 Organizational Year (1 September 2019 – 31 August 2020)

Activity #2

Please complete for each of the primary activities that you are planning for the upcoming organizational year. This form will provide MDRT and MCC leadership with the knowledge and understanding of the work that you. Each Chair is asked to establish a maximum of three activities for implementation (please utilize tabs below).

1st REPORT due 30 September, 2020	
*ACTIVITY:	MDRT DAY GREECE 2020
*Pillar (Identify the pillar that this activity supports)	<input checked="" type="radio"/> GROWTH <input type="radio"/> RETENTION <input type="radio"/> ENGAGEMENT
*DESCRIPTION (Provide a brief description of activity planned):	To share practical ideas regarding our profession which can be applied directly to our daily practice. To motivate them to improve their routine.
*MDRT STRATEGIC PLATFORM SUPPORTED (Identify platform(s):	<input checked="" type="checkbox"/> CELEBRATING ACHIEVEMENT <input type="checkbox"/> GUIDED DEVELOPMENT <input checked="" type="checkbox"/> STRONGER TOGETHER <input type="checkbox"/> TRANSFORMATIVE PRODUCTIVITY
*SCHEDULED DATE(s): When will the activity occur	2/7/20 To be confirmed.

<p>*IMPLEMENTATION/TIMELINE (Outline the process/steps planned, timeline and personnel (staff, vender and member volunteer) resources required)</p>	<p>9/30 – To finalize the venue and the primary speakers 10/15 Secure the Logo 10/15 Public announcement of the event and the beginning of the registrations 10/30 PGA, 60 persons, conclude the sponsorships</p>
<p>*PRIMARY TARGET MARKET/AUDIENCE (member/non-member, specific demographics such as region, age, membership years, membership type, etc.):</p>	<p>Aspirants</p>
<p>SECONDARY TARGET MARKET/AUDIENCE:</p>	<p>Non Members</p>

<p>*GOAL & SUCCESS MEASUREMENTS (identify specific, quantitative, measurable success goals):</p>	<p>Our goal is to come to our event 200 Aspirants</p>
<p>*NEEDS ANALYSIS (Please share quantifiable data that supports the request)</p>	<p>In the last 5 years which I am participating on the MCC, the MDRT Day events attracted 150 to 700 persons. Now I aiming to target aspirants in order to increase the members.</p>
<p>*BUDGET:</p>	<p><input checked="" type="checkbox"/> NONE</p> <p><input type="checkbox"/> Request MCC Budget (Outline budgets needs and rational; reach out to your Zone and Region Chair to submit budget request)</p> <p><input type="checkbox"/> Request Additional Budget (Outline budgets needs and rational reach out to your Zone and Region Chair to submit budget request)</p>
<p>*OUTLINE OF BUDGET NEEDS (if requested):</p>	<p>none</p>
<p>WHAT SUPPORT DO YOU NEED FROM MDRT:</p>	<p>We would like to support us with an Ambassador Speaker and a staff liaison in Athens in order to present a powerful image of MDRT.</p>

***List alternate approaches that were considered and reasons for choosing proposed activity.**

I would like MDRT to reflect on the Greek Insurance Industry as the elite place of the financial advisors and to end up to clients through the social media. Also I would like to connect the advisors between them, for personal and professional growth purposes.

MCC Business Plan Reporting Template

Country: GREECE
 2019-2020 Organizational Year (1 September 2019 – 31 August 2020)

Activity #3

Please complete for each of the primary activities that you are planning for the upcoming organizational year. This form will provide MDRT and MCC leadership with the knowledge and understanding of the work that you Each Chair is asked to establish a maximum of three activities for implementation (please utilize tabs below).

1st REPORT due 30 September, 2020	
*ACTIVITY:	Establish MDRT Greece Study Groups for all MDRT Members and Aspirants
*Pillar (Identify the pillar that this activity supports)	<input checked="" type="radio"/> GROWTH <input type="radio"/> RETENTION <input type="radio"/> ENGAGEMENT
*DESCRIPTION (Provide a brief description of activity planned):	Gives to members and aspirants the chance, to learn from the best of our industry and to connect with each other.
*MDRT STRATEGIC PLATFORM SUPPORTED (Identify platform(s):	<input type="checkbox"/> CELEBRATING ACHIEVEMENT <input type="checkbox"/> GUIDED DEVELOPMENT <input checked="" type="checkbox"/> STRONGER TOGETHER <input checked="" type="checkbox"/> TRANSFORMATIVE PRODUCTIVITY
*SCHEDULED DATE(s): When will the activity occur	From 15 th of October 2019 to 31 st of January 2020. In total 5 sessions. Dates to be advised .

<p>*IMPLEMENTATION/TIMELINE (Outline the process/steps planned, timeline and personnel (staff, venter and member volunteer) resources required)</p>	<p>a. The Study Group will be held through the ZOOM app in order to be attained by many participants from all over Greece. b. They will be separated in 5 to 8 teams and each team will study a specific step from the sale procedure. c. One day prior to MDRT Day the results will be announced to all members of the study group.</p>
<p>*PRIMARY TARGET MARKET/AUDIENCE (member/non-member, specific demographics such as region, age, membership years, membership type, etc.):</p>	<p>All members</p>
<p>SECONDARY TARGET MARKET/AUDIENCE:</p>	<p>Aspirants</p>

<p>*GOAL & SUCCESS MEASUREMENTS (identify specific, quantitative, measurable success goals):</p>	<p>a. After the completion of the study group, we will send to the participants a query to rate their satisfaction. The results could be used now and to the near future. b. To have 5 participants from the study group to enroll as members on 2020.</p>
<p>*NEEDS ANALYSIS (Please share quantifiable data that supports the request)</p>	<p>When Dimos Sykovaris did that many years ago, then the MCC Greece reached the peak of memberships by engaging advisors</p>
<p>*BUDGET:</p>	<p><input checked="" type="checkbox"/> NONE <input type="checkbox"/> Request MCC Budget (Outline budgets needs and rational; reach out to your Zone and Region Chair to submit budget request) <input type="checkbox"/> Request Additional Budget (Outline budgets needs and rational; reach out to your Zone and Region Chair to submit budget request)</p>
<p>*OUTLINE OF BUDGET NEEDS (if requested):</p>	<p>None</p>
<p>WHAT SUPPORT DO YOU NEED FROM MDRT:</p>	<p>None</p>

***List alternate approaches that were considered and reasons for choosing proposed activity.**

The detailed approach of the Sales Procedure is important for all the participants and especially when it comes from colleagues they do not have daily communication with each other. By sharing ideas everyone feels significant and comprehend the value of giving. This happens rarely outside of companies schemes , where the purpose is only for the products unlike to this study group which the main purpose is the personal growth.

MCC Business Plan Reporting Template

Country: IRELAND

2019-2020 Organizational Year (1 September 2019 – 31 August 2020)

Activity #1

Please complete for each of the primary activities that you are planning for the upcoming organizational year. This form will provide MDRT and MCC leadership with the knowledge and understanding of the work that you and your Each Chair is asked to establish a maximum of three activities for implementation (please utilize tabs below).

<u>1st REPORT due 30 September, 2020</u>	
*ACTIVITY:	MDRT National Sales Day - "Kick-Start 2020, Soft Skills Day" in conjunction with Brokers Ireland, Aviva, and possibly Acorn Life.
*Pillar (Identify the pillar that this activity supports)	<input type="radio"/> GROWTH <input type="radio"/> RETENTION <input checked="" type="radio"/> ENGAGEMENT
*DESCRIPTION (Provide a brief description of activity planned):	Organizing an "MDRT National Sales Day" to be held in Dublin. The emphasis of the sales day will be "Soft Skills to Kick-Start 2020". We want to have topical speakers on the benefits and ethos of MDRT.
*MDRT STRATEGIC PLATFORM SUPPORTED (Identify platform(s):	<input checked="" type="checkbox"/> CELEBRATING ACHIEVEMENT <input checked="" type="checkbox"/> GUIDED DEVELOPMENT <input checked="" type="checkbox"/> STRONGER TOGETHER <input checked="" type="checkbox"/> TRANSFORMATIVE PRODUCTIVITY
*SCHEDULED DATE(s): When will the activity occur	Tentative date is early December 2019. If this timeframe is not feasible, we would like to have the event by mid January 2020.

***IMPLEMENTATION/TIMELINE** (Outline the process/steps planned, timeline and personnel (staff, vender and member volunteer) resources required)

Have contacted Diarmuid Kelly at BI, who is agreeable, so long as the date does not interfere with BI annual meeting in February 2020. Diarmuid asked that we liaise with Rachel McGovern on the event. Have contacted Harry McKeon in Aviva, who liked the idea and asked us to liaise with Maeve Bambrick in Aviva, who is responsible for this type of event. Have contacted Eamonn Toner at Acorn Life, who is also agreeable and willing to discuss sponsorship. etc. Will meet with Anthony Jones and the MCC early October 2019 to discuss the way forward, regarding procuring sponsorship from representative body-Brokers Ireland, Aviva DAC, Irish Provider-Acorn Life, and possibly Royal London, New Ireland, Irish Life, and Zurich. May request an MDRT Ambassador as keynote speaker for the day. Working with Zone Chair, Anthony Jones and Gary Metcalf- Country Chair UK, on template/itinerary for the event. Brokers Ireland-Diarmuid Kelly & Rachel McGovern, on sponsorship, organization, and itinerary. Harry McKeon & Maeve Bambrick at Aviva for sponsorship and logistics. Acorn Life for sponsorship and possible speakers. MCC Ireland volunteer committee members to be designated roles to assist in many aspects of coordinating the event.

<p>*PRIMARY TARGET MARKET/AUDIENCE (member/non-member, specific demographics such as region, age, membership years, membership type, etc.):</p>	<p>All Irish MDRT members (current & former), aspirants, and non-members. There are 1200 +independent brokers in Ireland plus all tied agents for insurance providers in Ireland. As Ireland is a relatively small country, we would like to draw attendees from nationwide. Our goal is "Positive Engagement" with up to 300 attendees on the day to enhance MDRT ethos, education, recruitment and the benefits of MDRT membership efforts for 2019-2020. Our main focus will be on "Soft Skills to Kick-Start 2020", which could be very topical for Ireland, as the Irish Central Bank response on CP116 (a consumer protection paper to be added to the CPCode 2012) has just been released and is definitely a hot topic of conversation with brokers, as its introduction will have an impact on brokers & tied-agents from around March 2020.</p>
<p>SECONDARY TARGET MARKET/AUDIENCE:</p>	<p>Executives from the insurance providers, i.e., getting them on board with the MDRT ethos in relation to their direct sales force.</p>
<p>*GOAL & SUCCESS MEASUREMENTS (identify specific, quantitative, measurable success goals):</p>	<p>To engage with the target audience about the benefits and ethos of MDRT and how membership can enhance not only their careers, but also to explain how the "Whole Person" concept can benefit them personally as well as professionally. Our goal is to register 100 members from Ireland for the Annual Meeting in June 2020.</p>

<p>*NEEDS ANALYSIS (Please share quantifiable data that supports the request)</p>	<p>We want to engage with the 1200 + independent brokers in Ireland and numerous tied agents of life providers in Ireland. All are potential recruits for MDRT Ireland.</p>
<p>*BUDGET:</p>	<p><input type="checkbox"/> NONE</p> <p><input checked="" type="checkbox"/> Request MCC Budget (Outline budgets needs and rationale; reach out to your Zone and Region Chair to submit budget request)</p> <p><input type="checkbox"/> Request Additional Budget (Outline budgets needs and rationale; reach out to your Zone and Region Chair to submit budget request)</p>
<p>*OUTLINE OF BUDGET NEEDS (if requested):</p>	<p>TBD- Need to discuss and plan the following in detail with MCC and Anthony Jones ASAP: 1- Identify location & cost of venue. 2- Costs for lunch, tea break, etc. 3- Identify & book list of speakers to include a keynote speaker from MDRT and figure up any flight/accommodation costs for same. 4- All other misc. costs to be discussed, flagged and determined.</p>
<p>WHAT SUPPORT DO YOU NEED FROM MDRT:</p>	<p>Liaise with Anthony Jones & Lena Bykhovskiy to possibly request an MDRT Ambassador as keynote speaker for the day. Liaise with Gary Metcalf on obtaining MDRT brochures, MDRT gift paraphernalia for spot prizes (if available), etc. Any other support MDRT can provide to us will be helpful.</p>
<p>*List alternate approaches that were considered and reasons for choosing proposed activity.</p>	<p>Considered following on our project with our updated contact list from last year, i.e., personal contacts of MDRT members and aspirants. We decided the National Sales Day would be a more comprehensive approach to engage with our members, aspirants and non-members.</p>

MCC Business Plan Reporting Template

Country: _____ Israel _____

2019-2020 Organizational Year (1 September 2019 – 31 August 2020)

Activity #1

Please complete for each of the primary activities that you are planning for the upcoming organizational year. This form will provide MDRT and MCC leadership with the knowledge and understanding of the work that you and your team will be doing so that we can better support your efforts.

Each Chair is asked to establish a maximum of three activities for implementation (please utilize tabs below).

<u>1st REPORT due 30 September, 2020</u>	
*ACTIVITY:	The MDRT 2020 race
*Pillar (Identify the pillar that this activity supports)	<input checked="" type="radio"/> GROWTH <input type="radio"/> RETENTION <input type="radio"/> ENGAGEMENT
*DESCRIPTION (Provide a brief description of activity planned):	Reception, videos of MDRT, greetings, lecture on the integration of knowledge and professionalism of the fast with the today digitization and technology', lecture by MDRT Top of the Table member why to be MDRT member and what contributions you get from going to the conferences abroad, lecture by the chairman of the life insurance committee of the Israel insurance agency bureau ,a professional lecture by the host company and a lecture by Moshe Edri MDRT world representative about sales ideas and what is it to be a member of MDRT.
*MDRT STRATEGIC PLATFORM SUPPORTED (Identify platform(s):	<input type="checkbox"/> CELEBRATING ACHIEVEMENT <input type="checkbox"/> GUIDED DEVELOPMENT <input checked="" type="checkbox"/> STRONGER TOGETHER <input type="checkbox"/> TRANSFORMATIVE PRODUCTIVITY
*SCHEDULED DATE(s): When will the activity occur	03.12.2019

<p>*IMPLEMENTATION/TIMELINE (Outline the process/steps planned, timeline and personnel (staff, vender and member volunteer) resources required)</p>	<p>The seminar was discussed during the last 3 months once a month for 4 hours in the MDRT leadership meetings, the tasks for perfecting the seminar were divided among the MCC members: * Pini Hagag- responsible for recruiting new candidates. *Rim Shocka- responsible for the digital registration and tracking it. * Nava Wickleman- responsible for the contact with the insurance companies. * Avshalom Moskowitz- responsible for the lectures and will conduct the seminar. * Boaz barel- responsible for partner care during the day and policing and guidance. * Alon Guy- responsible for registration of name tags, monitoring and retaining MDRT members in the seminar.</p>
<p>*PRIMARY TARGET MARKET/AUDIENCE (member/non-member, specific demographics such as region, age, membership years, membership type, etc.):</p>	<p>To enlarge MDRT lines in Israel and to preserve existing members. Audience: nem candidates and existing members. Average age 30-50.</p>
<p>SECONDARY TARGET MARKET/AUDIENCE:</p>	<p>To bring at least 50 members to the Annual Meeting in Anaheim.</p>

<p>*GOAL & SUCCESS MEASUREMENTS (identify specific, quantitative, measurable success goals):</p>	<p>The goal is to list as many new candidates as possible and to preserve existing members. The success of the activity will be measured by the number of new candidates who sign up for MDRT and the number of members that will come to the Annual Meeting.</p>
<p>*NEEDS ANALYSIS (Please share quantifiable data that supports the request)</p>	<p>Guest lecturer from MDRT (that this request has been met). Event budget received from insurance company Migdal.</p>
<p>*BUDGET:</p>	<p><input checked="" type="checkbox"/> NONE <input type="checkbox"/> Request MCC Budget (Outline budgets needs and rational; reach out to your Zone and Region Chair to submit budget request) <input type="checkbox"/> Request Additional Budget (Outline budgets needs and rational; reach out to your Zone and Region Chair to submit budget request)</p>
<p>*OUTLINE OF BUDGET NEEDS (if requested):</p>	
<p>WHAT SUPPORT DO YOU NEED FROM MDRT:</p>	<p>Guest lecturer from MDRT (that this request has been met).</p>
<p>*List alternate approaches that were considered and reasons for choosing proposed activity.</p>	<p>Increasing the number of members that will come to the Annual Meeting and the chosen age of the new candidates is for rejuvenate members age.</p>

MCC Business Plan Reporting Template

Country: Israel

2019-2020 Organizational Year (1 September 2019 – 31 August 2020)

Activity #2

Please complete for each of the primary activities that you are planning for the upcoming organizational year. This form will provide MDRT and MCC leadership with the knowledge and understanding of the work that you and your team will be doing so that we can better support Each Chair is asked to establish a maximum of three activities for implementation (please utilize tabs below).

<u>1st REPORT due 30 September, 2020</u>	
*ACTIVITY:	MDRT Day
*Pillar (Identify the pillar that this activity supports)	<input type="radio"/> GROWTH <input checked="" type="radio"/> RETENTION <input type="radio"/> ENGAGEMENT
*DESCRIPTION (Provide a brief description of activity planned):	At the first day the lectures will begin from 14:00 to 17:30 and at 19:00 will begin an annual gala with dinner that will include greetings from MDRT representatives. At the second day there will be professional lectures from 09:00 to 14:00.
*MDRT STRATEGIC PLATFORM SUPPORTED (Identify platform(s):	<input type="checkbox"/> CELEBRATING ACHIEVEMENT <input type="checkbox"/> GUIDED DEVELOPMENT <input checked="" type="checkbox"/> STRONGER TOGETHER <input type="checkbox"/> TRANSFORMATIVE PRODUCTIVITY
*SCHEDULED DATE(s): When will the activity occur	15-16.03.2019

<p>*IMPLEMENTATION/TIMELINE (Outline the process/steps planned, timeline and personnel (staff, vender and member volunteer) resources required)</p>	<p>The discussions of the event were raised at the first leadership meeting and at the end of " the MDRT 2020 race" , there will be in-depth discussions in the MDRT leadership meetings for planning and success of the event in Eilat.</p>
<p>*PRIMARY TARGET MARKET/AUDIENCE (member/non-member, specific demographics such as region, age, membership years, membership type, etc.):</p>	<p>Preserving the existing members.</p>
<p>SECONDARY TARGET MARKET/AUDIENCE:</p>	

<p>*GOAL & SUCCESS MEASUREMENTS (identify specific, quantitative, measurable success goals):</p>	<p>The goal is to preserve the existing members. The success of the activity will be measured by the number of members that will come to the Annual Meeting.</p>
<p>*NEEDS ANALYSIS (Please share quantifiable data that supports the request)</p>	
<p>*BUDGET:</p>	<p><input checked="" type="checkbox"/> NONE <input type="checkbox"/> Request MCC Budget (Outline budgets needs and rational; reach out to your Zone and Region Chair to submit budget request) <input type="checkbox"/> Request Additional Budget (Outline budgets needs and rational reach out to your Zone and Region Chair to submit budget request)</p>
<p>*OUTLINE OF BUDGET NEEDS (if requested):</p>	
<p>WHAT SUPPORT DO YOU NEED FROM MDRT:</p>	<p>To invite Anthony Jones to the conference in Eilat and Mickey Hoyzli the former president and Lena Polishuk to strengthen the relationship with the insurance companies in Israel.</p>

***List alternate approaches that were considered and reasons for choosing proposed activity.**

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MCC Business Plan Reporting Template

UK

2019-2020 Organizational Year (1 September 2019 – 31 August 2020)

Activity #1

Please complete for each of the primary activities that you are planning for the upcoming organizational year. This form will provide MDRT and MCC leadership with the knowledge and understanding of the work that you and your Each Chair is asked to establish a maximum of three activities for implementation (please utilize tabs below).

	<u>1st REPORT due 30 September, 2020</u>
*ACTIVITY:	We had another very successful event with the PFS on 11th September. It was sold out within 3 days. 150 advisers attended and there were 223 on the live stream. 53 are interested in MDRT
*Pillar (Identify the pillar that this activity supports)	<input checked="" type="radio"/> GROWTH <input type="radio"/> RETENTION <input type="radio"/> ENGAGEMENT
*DESCRIPTION (Provide a brief description of activity planned):	As above plus attending the Solidus conference again on 6th November. Approx 100 advisers will attend. In January we are having a stand at an 'openwork' event. Approx 1000 advisers will be attending.
*MDRT STRATEGIC PLATFORM SUPPORTED (Identify platform(s):	<input type="checkbox"/> CELEBRATING ACHIEVEMENT <input type="checkbox"/> GUIDED DEVELOPMENT <input checked="" type="checkbox"/> STRONGER TOGETHER <input type="checkbox"/> TRANSFORMATIVE PRODUCTIVITY
*SCHEDULED DATE(s): When will the activity occur	Dates as above

<p>*IMPLEMENTATION/TIMELINE (Outline the process/steps planned, timeline and personnel (staff, vender and member volunteer) resources required)</p>	<p>PFS event has already happened. Marketing material has been requested for the Solidus conference and will be needed for the event we are attending in January.</p>
<p>*PRIMARY TARGET MARKET/AUDIENCE (member/non-member, specific demographics such as region, age, membership years, membership type, etc.):</p>	<p>Non member although some MDRT members will be at the Solidus event. There were about 30 MDRT members at the PFS event. All of them thought it was excellent. The feedback from all the delegates has been very positive. I expect at least 10 new members as a result of the PFS event</p>
<p>SECONDARY TARGET MARKET/AUDIENCE:</p>	<p>Same as primary</p>

<p>*GOAL & SUCCESS MEASUREMENTS (identify specific, quantitative, measurable success goals):</p>	<p>I have set the UK a goal of 30 new members. The membership have also been informed of our target in my last year of UK chair</p>
<p>*NEEDS ANALYSIS (Please share quantifiable data that supports the request)</p>	
<p>*BUDGET:</p>	<p><input type="checkbox"/> NONE</p> <p><input checked="" type="checkbox"/> Request MCC Budget (Outline budgets needs and rational; reach out to your Zone and Region Chair to submit budget request)</p> <p><input type="checkbox"/> Request Additional Budget (Outline budgets needs and rational; reach out to your Zone and Region Chair to submit budget request)</p>
<p>*OUTLINE OF BUDGET NEEDS (if requested):</p>	<p>Printing costs which has been paid. Also, there will be additional printing costs for the event we are attending in January</p>
<p>WHAT SUPPORT DO YOU NEED FROM MDRT:</p>	<p>Marketing material and give a ways like pens etc.</p>

***List alternate approaches that were considered and reasons for choosing proposed activity.**

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MEMBERSHIP COMMUNICATIONS DIVISION 1 ZONE 10 – EUROPE

Hungary is an area of opportunity again. We have now in place two company chairs for MetLife in Budapest. It's hoped that as the Hungarian membership exceeds 50+ consistently and that there will be enough volunteers to restart MCC and further develop Europe MCC as a region. Very exciting times ahead.

Zone chair is meeting both company chairs in Budapest on the 18th October to further develop these relationships and grow Team Hungary.

Special mention must be given to Karolos in Greece. His continued development and organisational skills continue to impress and indeed warrant further MCC development. This is also true to a slightly different extent to Gary in the UK who is, at the request of MDRT, now entering his third year as country chair. A special bravo to these two.

David and Albert exceeded our expectations last year and I am hoping this repeats itself for 2020.

Anthony Jones, October 14th 2020

MDRT Zone Chair Europe

Regional Chair Comments

Anthony Jones provided the report to me on time. Anthony and his team have worked very well to build on the foundation and are continuing the momentum. As Europe Chair, Anthony has provided excellent leadership including visiting respective countries to support the chairs and speaking.

We have a number of events that are being planned across all four countries, Greece, Ireland, Israel and UK. These events are supported by the newly formatted business plan. It is noted that succession planning is a challenge across the Europe zone with the workload falling on the country chairs. Although they are doing a great job, it will lead to burnout. I feel a more structured committee style with the support of companies could help support them better. All countries embraced the Pillars of Leadership and participated well at MCC meeting in Chicago.

In terms of special mention, Karolos in Greece has stepped up in his role whilst David Naramore has enthusiastically engaged the members in Ireland whilst Gary continues to support as past UK Chair.

There is an opportunity within Hungary to develop a further MCC which Anthony is working on presently. Although Europe does have its challenges, I feel there is a great deal of energy and enthusiasm and they have an exciting 12 months ahead.

Global Council comments

- Retention is the third priority. They are focussing more on growth and engagement.
- Events being planned in all countries
- Business plans were submitted by all country Chairs – Kudos to that
- Except for Greece, succession planning is an issue in the other Countries
- Hungary could be another country soon having its own country chair

MEMBERSHIP COMMUNICATIONS DIVISION 1
ZONE 11 – LATIN AMERICA

OBJECTIVE:

Actively promote MDRT membership to current and potential members worldwide. Monitor industry activities and involvement worldwide, and serve as a two-way communication link between MDRT leadership and the membership at large. Convey MDRT information to members and potential members through companies and industry associations.

PARTICIPANTS

ExCom Liaison(s):	Randy L. Scritchfield, CFP, LUTCF, Damascus, Maryland, USA Peggy Tsai, RFP, CCFP, Taipei, Taiwan
Global Council Member:	Priti Ajit Kucheria, LUTCF, CFP, Mumbai, India
Region Chair:	Herman Colin, LUTCF, CLI, Estado De Mexico, Mexico
Zone Chair:	Pablo Ponce Martinez, Nuevo Leon, Mexico
Staff Liaison:	Sara Estrella

ZONE 11 CHAIR

What do you see as your biggest challenge for the upcoming year?

In Panama, we will be focusing on retention and Mentoring Program by consolidating an already very structured project that they have been working on from previous years.

In regards to Mexico, Brazil and Argentina, the challenge is in the growth of the membership, consolidating a methodology that allows us to project and plan to sustained growth in the other countries.

The most important general challenge is to consolidate a well-connected, communicated and structured Latin American community that allows us to reach more memberships while maintaining those that exist and overcoming the misgivings that companies express among themselves. Looking for mechanisms for agents in each of their countries to see the qualitative value of belonging to MDRT and put it into practice by spreading the spirit of this association to other members of their office, their locality and their country.

What support do you need from MDRT, your Region Chair and Global Council Member?

MDRT to provide statistics and information on the sector in each of the countries in my zone. Provide tools to establish communication with my country chairs and these in turn with their company and local chairs (i.e. WeChat, WhatsApp).

In regards to region chair, I need his active participation in the decisions that we undertake in Zone 11 to achieve a functional team that continues over time despite the change of leadership and that generates a progressive work from one year to another based on the continuity of a plan long term.

We have a sleeping giant with enormous potential that we have not managed to take off systematically despite the fact that much progress has been made in the area and we have great leaders, the opportunity to make a definitive leap is still latent.

To manage more events in Zone 11 with the presence of MDRT Ambassadors and MDRT Executive Committee members that give weight and quality to them.

MEMBERSHIP COMMUNICATIONS DIVISION 1
ZONE 11 – LATIN AMERICA

Support the idea presented by Herman Colin, Region Chair, to do things differently. To offer MDRT Annual Meeting outside of Canada or the USA, consider having the first Annual Meeting in Mexico City, Mexico. Mexico has the highest membership in Zone 11.

Additional Comments:

I believe Latin America is going through a demographic moment and of unrepeatable growth and that it still lacks training or growth for the insurance sector and very particularly of the advisors that form it this juncture can be a window of opportunities for an association such as MDRT.

I trust that the decisions and changes that are taken from headquarters for Zone 11 must take into account the experience and dedication that both MDRT staff members, advisors and insurance companies have built over these years.

Member Recognition: Recognize members whose contributions exceeded expectations. Provide examples. Identify the top three candidates to be considered as your successor.

- | | | |
|----|------------------|----------------------------------|
| A) | Andrea Alcala | Country Chair of Mexico |
| B) | Marco Vassao | Country Chair of Brazil |
| C) | Diego de la Mora | Previous Country Chair of México |

REGION CHAIR COMMENTS:

Zone 11 of Latin America is a complex area, since it has very large countries with good penetration in terms of membership, but also small enough countries in which the membership is poor and there is much to do.

As the Zone Chair Pablo Ponce says, giving him more support and facilitating and authorizing the suggested requests, can increase the number of memberships in a promising way.

I know there are minimum times to approve or implement certain requests. However, it is important to give it greater agility. We must be more dynamic and as I have often heard on the different committees. We must think differently starting thinking out of the box.

As a last comment and this is taking into account all the countries involved in the MDRT, if we want to increase and maintain the current members, we must give them new things, new destinations and new experiences. We must give more value to our membership.

GLOBAL COUNCIL MEMBER COMMENTS:

- Primary focus is on retention and mentoring
- Strongly recommending Annual Meeting in Mexico City, Mexico. Mexico has the highest membership in Zone 11
- This zone is a sleeping giant with enormous potential
- Request for help on social chat tools such as WeChat, WhatsApp, etc. for communication
- Requests help in providing statistics of the countries, help in events with ambassadors

MCC Plantilla de Informes del Plan de Negocio

País: Argentina

2019-2020 Año de Organización (1 Septiembre 2019 – 31 Agosto 2020)

Por favor de completar para cada una de las actividades principales que está planeando para el próximo año organizativo. Este formulario proporcionará a MDRT y los líderes de MCC el conocimiento y la comprensión del plan a cada Director que establezca un máximo de tres actividades para la implementación (por favor utilice etiquetas)

Activity #1

	<u>PRIMER INFORME fecha limite 30 Septiembre, 2020</u>
*ACTIVIDAD:	Two Company Workshops (SMG Life & CNP Seguros)
*Pilar (Identifique el pilar que respalda esta actividad)	<input checked="" type="radio"/> Growth <input type="radio"/> Retention <input type="radio"/> Engagement
*DESCRIPCION (Proporcione una descripción breve de la actividad planificada):	Invite an MDRT member speaker and a local speaker.
*MDRT PLATAFORMA ESTRATEGICA APOYADA (Identificar plataforma(s):	<input type="checkbox"/> CELEBRACION DE LOGROS <input checked="" type="checkbox"/> DESARROLLO DIRIGIDO <input type="checkbox"/> UNIDOS SOMOS MÁS FUERTES <input type="checkbox"/> PRODUCTIVIDAD TRANSFORMADORA
*FECHA(S) ESTABLECIDA(S): ¿Cuándo se llevará a cabo la actividad?	February 6, 2020 and February 7, 2020.
*IMPLEMENTACION/LINEA DE TIEMPO (Esbozar el proceso/pasos planificados, línea de tiempo y el personal (personal, vendedor, miembro voluntario y recursos requeridos)	Coordination with the two companies for the confirmation of the event. The companies will be responsible for all the costs in relation to the activity. MCC Company Chairs will assist with the coordination of the event, as well as for the participation of the local speakers.

<p>*OBJETIVO PRINCIPAL MERCADO/AUDENCIA: (miembro/no miembro, datos demográficos específicos como región, edad, años de membresía, tipo de membresía, etc.):</p>	<p>Main objective is the nonmembers. GROWTH: The objective for Argentina is to grow membership. This will be based on the unconditional support of active members, who are highly committed to our industry and the values that MDRT transmits to us.</p>
<p>SEGUNDO OBJETIVO MERCADO/AUDIENCIA:</p>	<p>Consolidation of current members: Retention</p>
<p>*METAS Y MEDIDAS DE SUCESOS (identificar objetivos de éxito específicos, cuantitativos y medibles):</p>	<p>Increase membership by 30% by 2020.</p>
<p>*ANÁLISIS DE NECESIDADES (Por favor, comparte datos cuantificables que admitan la solicitud)</p>	<p>In Argentina, we have 1,500 brokers that are dedicated exclusively to selling life products and we have only 50 active MDRT members.</p>
<p>*PRESUPUESTO:</p>	<p><input type="checkbox"/> NINGUNO</p> <p><input checked="" type="checkbox"/> Solicitar Presupuesto MCC (Escenifique las necesidades presupuestarias y racional; comuníquese con su Director de Zona y Región para presentar la solicitud de presupuesto)</p> <p><input type="checkbox"/> Solicitar Presupuesto Adicional (Escenifique las necesidades presupuestarias y racional; comuníquese con su Director de Zona y Región para presentar la solicitud de presupuesto)</p>

<p>*ESQUEMA DE NECESIDADES DE PRESUPUESTO (si se solicita):</p>	<p>MDRT to provide a speaker and promotional material such as flyers and giveaways.</p>
<p>QUE APOYO NECESITAS DE MDRT:</p>	<p>n/a</p>
<p>*Lista de los enfoques alternativos que se consideraron y las razones para elegir la actividad propuesta.</p>	<p>In Argentina, companies are very committed to support MCC and continue to have a committee in MDRT. Companies will support to increase the membership numbers by creating incentives.</p>

MCC Plantilla de Informes del Plan de Negocio

País: Argentina

2019-2020 Año de Organización (1 Septiembre 2019 – 31 Agosto 2020)

Activity #2

Por favor de completar para cada una de las actividades principales que está planeando para el próximo año organizativo. Este formulario proporcionará a MDRT y los líderes de MCC el conocimiento y la cada Director que establezca un máximo de tres actividades para la implementación (por favor utilice etique

	<u>PRIMER INFORME fecha limite 30 Septiembre, 2020</u>
*ACTIVIDAD:	Membership Growth
*Pilar (Identifique el pilar que respalda esta actividad)	<input checked="" type="radio"/> Growth <input type="radio"/> Retention <input type="radio"/> Engagement
*DESCRIPCION (Proporcione una descripción breve de la actividad planificada):	Trips to various cities in Argentina to introduce MDRT to new brokers
*MDRT PLATAFORMA ESTRATEGICA APOYADA (Identificar plataforma(s):	<input type="checkbox"/> CELEBRACION DE LOGROS <input checked="" type="checkbox"/> DESARROLLO DIRIGIDO <input type="checkbox"/> UNIDOS SOMOS MÁS FUERTES <input type="checkbox"/> PRODUCTIVIDAD TRANSFORMADORA
*FECHA(s) ESTABLECIDA(S): ¿Cuándo se llevará a cabo la actividad?	03/01/20

<p>*IMPLEMENTACION/LINEA DE TIEMPO (Esbozar el proceso/pasos planificados, línea de tiempo y el personal (personal, vendedor, miembro voluntario y recursos requeridos)</p>	<p>Current members and company chairs will be visiting companies to various parts of the country targeting new companies that don't have knowledge of MDRT.</p>
<p>*OBJETIVO PRINCIPAL MERCADO/AUDIENCIA: (miembro/no miembro, datos demográficos específicos como región, edad, años de membresía, tipo de membresía, etc.):</p>	<p>Grow membership</p>
<p>SEGUNDO OBJETIVO MERCADO/AUDIENCIA:</p>	<p>Retention</p>

<p>*METAS Y MEDIDAS DE SUCESOS (identificar objetivos de éxito específicos, cuantitativos y medibles):</p>	<p>Grow 40%</p>
<p>*ANÁLISIS DE NECESIDADES (Por favor, comparte datos cuantificables que admitan la solicitud)</p>	<p>In some areas of Argentina there is no knowledge of MDRT. There is a great desire from companies to be part of MDRT, since they know the positive impact that this has on their sales.</p>
<p>*PRESUPUESTO:</p>	<p><input checked="" type="checkbox"/> None <input type="checkbox"/> Solicitar Presupuesto MCC (Escenifique las necesidades presupuestarias y racional; comuníquese con su Director de Zona y Región para presentar la solicitud de presupuesto) <input type="checkbox"/> Solicitar Presupuesto Adicional (Escenifique las necesidades presupuestarias y racional; comuníquese con su Director de Zona y Región para presentar la solicitud de presupuesto)</p>
<p>*ESQUEMA DE NECESIDADES DE PRESUPUESTO (si se solicita):</p>	<p>Will not require budget, we will be using the offices of Company Chairs.</p>
<p>QUE APOYO NECESITAS DE MDRT:</p>	
<p>*Lista de los enfoques alternativos que se consideraron y las razones para elegir la actividad propuesta.</p>	

MCC Business Plan Reporting Template

Country: Brasil

2019-2020 Organizational Year (1 September 2019 - 31 August 2020)

Activity #1

Please complete for each of the primary activities that you are planning for the upcoming organizational year. This form will provide MDRT and MCC leadership with the knowledge and understanding of the work that you and your team will be doing so that we can better support your efforts.

Each Chair is asked to establish a maximum of three activities for implementation (please utilize tabs below)

	<u>1st REPORT due 30 September, 2020</u>
*ACTIVITY:	Visit Insurance Companies
*Pillar (Identify the pillar that this activity supports)	GROWTH
*DESCRIPTION (Provide a brief description of activity planned):	Visiting companies and discussing membership benefits to their brokers and how they can apply what they learn at MDRT to grow in their profession.
*MDRT STRATEGIC PLATFORM SUPPORTED (Identify platform(s):	CELEBRATING ACHIEVEMENT
*SCHEDULED DATE(s): When will the activity occur	In Miami AM - Conversation Prudential CCO; 23jul2019 -Visit Mapfre CCO; 25jul2019 Visit Mongeral CCO; 04sep19 Visit Porto Seguro CCO, November expecting Visit Bradesco CCO; November 2019 - Participate Mongeral event; November 19 - expecting meeting CCO MetLife

<p>*IMPLEMENTATION/TIMELINE (Outline the process/steps planned, timeline and personnel (staff, vender and member volunteer) resources required)</p>	<p>Discuss with managers how they can improve rankings, bonus and incentive campaigns to increase their advisors participation. Every company have their own schedule to do that</p>	
<p>*PRIMARY TARGET MARKET/ AUDIENCE (member/non-member, specific demographics such as region, age, membership years, membership type, etc.):</p>	<p>Insurance brokers through agency managers</p>	
<p>SECONDARY TARGET MARKET/ AUDIENCE:</p>	<p>CCOs and Director because some those are never at Annual Meeting.</p>	
<p>*GOAL & SUCCESS MEASUREMENTS (identify specific, quantitative, measurable success goals):</p>	<p>300 Brazilians members and 200 going to Anaheim AM 2020.</p>	
<p>*NEEDS ANALYSIS (Please share quantifiable data that supports the request)</p>	<p>Understand why some companies disagree to send their advisors to Annual Meeting.</p>	

<p>*BUDGET:</p>	<p>NONE Request MCC Budget (Outline budgets needs and rational; reach out to your Zone and Region Chair to submit budget request) Request Additional Budget (Outline budgets needs and rational; reach out to your Zone and Region Chair to submit budget request)</p>	
<p>*OUTLINE OF BUDGET NEEDS (if requested):</p>	<p>None</p>	
<p>WHAT SUPPORT DO YOU NEED FROM MDRT:</p>	<p>Special Guest Invitation to the CCOs as we need.</p>	
<p>*List alternate approaches that were considered and reasons for choosing proposed activity.</p>	<p>Alternate approach is going straight to the brokers. We believe once we have the CCO/managers at our side will be much more effective.</p>	

**MCC Business Plan Reporting Template Country: Brasil
2019-2020 Organizational Year (1 September 2019 - 31 August 2020)**

Activity #2

Please complete for each of the primary activities that you are planning for the upcoming organizational year. This form will provide MDRT and MCC leadership with the knowledge and understanding of the work that you and your team will be doing so that we can better support your efforts. Each Chair is asked to establish a maximum of three activities for implementation (please utilize tabs below).

	<u>1st REPORT due 30 September, 2020</u>
*ACTIVITY:	Studies Groups/Mentoring
*Pillar (Identify the pillar that this activity supports)	RETENTION and ENGAGEMENT
*DESCRIPTION (Provide a brief description of activity planned):	Establishing studies groups in each company, showing them the principle of sharing you receiving and how is important to share. If people feel important in the process they going to follow.
*MDRT STRATEGIC PLATFORM SUPPORTED (Identify platform(s)):	GUIDED DEVELOPMENT STRONGER TOGETHER
*SCHEDULED DATE(s): When will the activity occur	15sept19 - Meeting with two MDRT expert members to study MDRT Mentoring Guidelines

<p>*IMPLEMENTATION/TIMELINE (Outline the process/steps planned, timeline and personnel (staff, venter and member volunteer) resources required)</p>	<p>25sep19 - First Study Group Meeting preparing to grow and multiply. Prudential will be the first group of people, as soon they are prepare, we are going to follow the same process with the other companies.</p>	
<p>*PRIMARY TARGET MARKET/ AUDIENCE (member/non-member, specific demographics such as region, age, membership years, membership type, etc.):</p>	<p>Future members and aspirants, but just mentees who can achieve at least the production requirement to attend Annual Meeting in Anaheim, CA.</p>	
<p>SECONDARY TARGET MARKET/ AUDIENCE:</p>	<p>Past members who somehow gave up and stopped participating.</p>	
<p>*GOAL & SUCCESS MEASUREMENTS (identify specific, quantitative, measurable success goals):</p>	<p>The goal is to have at least three studies groups in each company.</p>	

*NEEDS ANALYSIS (Please share quantifiable data that supports the request)	How are the companies going to understand and agree with that?	
*BUDGET:	<p>NONE Request MCC Budget (Outline budgets needs and rational; reach out to your Zone and Region Chair to submit budget request) Request Additional Budget (Outline budgets needs and rational reach out to your Zone and Region Chair to submit budget request)</p>	
*OUTLINE OF BUDGET NEEDS (if requested):	None	
WHAT SUPPORT DO YOU NEED FROM MDRT:	Promotional material and PowerPoint presentation	
*List alternate approaches that were considered and reasons for choosing proposed activity.	One on one with the past members and understand why they didn't return to MDRT.	

MCC Plantilla de Informes del Plan de Negocio

País: MÉXICO

2019-2020 Año de Organización (1 Septiembre 2019 – 31 Agosto 2020)

Activity #1

Por favor de completar para cada una de las actividades principales que está planeando para el próximo año organizativo. Este formulario proporcionará a MDRT y los líderes de MCC el conocimiento y la comprensión del e a cada Director que establezca un máximo de tres actividades para la implementación (por favor utilice etiquetas c

	<u>PRIMER INFORME fecha limite 30 Septiembre, 2020</u>
*ACTIVIDAD:	Organize MDRT Day with Companies
*Pilar (Identifique el pilar que respalda esta actividad)	<input checked="" type="radio"/> Growth <input type="radio"/> Retention <input type="radio"/> Engagement
*DESCRIPCION (Proporcione una descripción breve de la actividad planificada):	1. Organize an MDRT Day/Workshop with the top companies 2. Promote Mentoring Program
*MDRT PLATAFORMA ESTRATEGICA APOYADA (Identificar plataforma(s)):	<input type="checkbox"/> CELEBRACION DE LOGROS <input checked="" type="checkbox"/> DESARROLLO DIRIGIDO <input type="checkbox"/> UNIDOS SOMOS MÁS FUERTES <input type="checkbox"/> PRODUCTIVIDAD TRANSFORMADORA
*FECHA(s) ESTABLECIDA(s): ¿Cuándo se llevará a cabo la actividad?	On September 19, 2019, MetLife Monterrey had their first MDRT Day Company event. The rest of the companies are still pending until I meet with my team.

<p>*IMPLEMENTACION/LINEA DE TIEMPO (Esbozar el proceso/pasos planificados, línea de tiempo y el personal (personal, vendedor, miembro voluntario y recursos requeridos))</p>	<p>Meet all the leaders, CEOs and managers of the commercial areas of all insurers to be able to promote the event in each company. The required material are brochures, banners, presentations, pens, speakers. Meetings with leaders and mentors to continue growing the number of applicants.</p>
<p>*OBJETIVO PRINCIPAL MERCADO/AUDENCIA: (miembro/no miembro, datos demográficos específicos como región, edad, años de membresía, tipo de membresía, etc.):</p>	<p>Work on retention and membership growth.</p>
<p>SEGUNDO OBJETIVO MERCADO/AUDIENCIA:</p>	<p>Work on membership growth and Mentoring Program.</p>

<p>*METAS Y MEDIDAS DE SUCESOS (identificar objetivos de éxito específicos, cuantitativos y medibles):</p>	<p>MDRT Day with Metlife Monterrey was a huge success, they had 110 advisors (members and nonmembers).</p>
<p>*ANÁLISIS DE NECESIDADES (Por favor, comparte datos cuantificables que admitan la solicitud)</p>	<p>Have a meeting of the entire MCC team to present the work plan and the objectives to be met by each region.</p>
<p>*PRESUPUESTO:</p>	<p><input type="checkbox"/> NINGUNO</p> <p><input checked="" type="checkbox"/> Solicitar Presupuesto MCC (Escenifique las necesidades presupuestarias y racional; comuníquese con su Director de Zona y Región para presentar la solicitud de presupuesto)</p> <p><input type="checkbox"/> Solicitar Presupuesto Adicional (Escenifique las necesidades presupuestarias y racional; comuníquese con su Director de Zona y Región para presentar la solicitud de presupuesto)</p>
<p>*ESQUEMA DE NECESIDADES DE PRESUPUESTO (si se solicita):</p>	<p>Requesting budget to have meeting with my team.</p>
<p>QUE APOYO NECESITAS DE MDRT:</p>	<p>Approval of planning meeting with my team and provide the material requested for MDRT Days.</p>
<p>*Lista de los enfoques alternativos que se consideraron y las razones para elegir la actividad propuesta.</p>	

MCC Plantilla de Informes del Plan de Negocio

País: PANAMA

2019-2020 Año de Organización (1 Septiembre 2019 – 31 Agosto 2020)

Activity #1

Por favor de completar para cada una de las actividades principales que está planeando para el próximo año organizativo. Este formulario proporcionará a MDRT y los líderes de MCC el conocimiento y la comprensión del e a cada Director que establezca un máximo de tres actividades para la implementación (por favor utilice etiquetas c

PRIMER INFORME fecha limite 30 Septiembre, 2020	
*ACTIVIDAD:	Workshop
*Pilar (Identifique el pilar que respalda esta actividad)	<input type="radio"/> Growth <input checked="" type="radio"/> Retention <input type="radio"/> Engagement
*DESCRIPCION (Proporcione una descripción breve de la actividad planificada):	Have half day workshop where we will work on motivation with MDRT members and mentees. Guest speaker FERNANDO GOU.
*MDRT PLATAFORMA ESTRATEGICA APOYADA (Identificar plataforma(s)):	<input type="checkbox"/> CELEBRACION DE LOGROS <input checked="" type="checkbox"/> DESARROLLO DIRIGIDO <input type="checkbox"/> UNIDOS SOMOS MÁS FUERTES <input type="checkbox"/> PRODUCTIVIDAD TRANSFORMADORA
*FECHA(s) ESTABLECIDA(s): ¿Cuándo se llevará a cabo la actividad?	8-Jan-20

<p>*IMPLEMENTACION/LINEA DE TIEMPO (Esbozar el proceso/pasos planificados, línea de tiempo y el personal (personal, vendedor, miembro voluntario y recursos requeridos))</p>	<p>The process has been to have a meeting with all the managers and CEOs to evaluate the growth of each advisor, the meeting happens every four months.</p>
<p>*OBJETIVO PRINCIPAL MERCADO/AUDENCIA: (miembro/no miembro, datos demográficos específicos como región, edad, años de membresía, tipo de membresía, etc.):</p>	<p>We will be focusing on membership retention and Mentoring Program as a continuity of 2018-2019 project. In the first period, we achieved a growth of 43%. The first MDRT DAY was a great success, we had 318 attendees. We are going to focusing on maintaining membership and promote MDRT tools.</p>
<p>SEGUNDO OBJETIVO MERCADO/AUDIENCIA:</p>	<p>Members and Mentoring Program with companies</p>

<p>*METAS Y MEDIDAS DE SUCESOS (identificar objetivos de éxito específicos, cuantitativos y medibles):</p>	<p>On April 4, 2019, Panama had their MDRT Day, which was a huge success. The objective was to increase membership by 25%. The focus will be on membership retention and to have the mentees reach MDRT.</p>
<p>*ANÁLISIS DE NECESIDADES (Por favor, comparte datos cuantificables que admitan la solicitud)</p>	<p>We would like to have someone from the Executive Committee to visit Panama in 2020.</p>
<p>*PRESUPUESTO:</p>	<p><input checked="" type="checkbox"/> NINGUNO</p> <p><input type="checkbox"/> Solicitar Presupuesto MCC (Escenifique las necesidades presupuestarias y racional; comuníquese con su Director de Zona y Región para presentar la solicitud de presupuesto)</p> <p><input type="checkbox"/> Solicitar Presupuesto Adicional (Escenifique las necesidades presupuestarias y racional; comuníquese con su Director de Zona y Región para presentar la solicitud de presupuesto)</p>
<p>*ESQUEMA DE NECESIDADES DE PRESUPUESTO (si se solicita):</p>	
<p>QUE APOYO NECESITAS DE MDRT:</p>	<p>MCC Panama requests that the Executive Committee be able to include a visit to Panama.</p>
<p>*Lista de los enfoques alternativos que se consideraron y las razones para elegir la actividad propuesta.</p>	

MEMBERSHIP COMMUNICATIONS DIVISION 1
ZONE 12 – MIDDLE EAST/AFRICA

OBJECTIVE:

Actively promote MDRT membership to current and potential members worldwide. Monitor industry activities and involvement worldwide, and serve as a two-way communication link between MDRT leadership and the membership at large. Convey MDRT information to members and potential members through companies and industry associations.

PARTICIPANTS

ExCom Liaison(s):	Randy L. Scritchfield, CFP, LUTCF, Damascus, Maryland, USA Peggy Tsai, RFP, CCFP, Taipei, Taiwan
Global Council Member:	Priti Ajit Kucheria, LUTCF, CFP, Mumbai, India
Region Chair:	Manu Dhawan, New Delhi, India
Zone Chair:	Naji A. Haddad, Beirut, Lebanon
Staff Liaison:	Lena Polishuk

ZONE 12 CHAIR – NAJI HADDAD

What do you see as your biggest challenge for the upcoming year?

I can't say it's a biggest challenge, what we should do is to promote MDRT and the benefits of MDRT as much as we can, and to tell all agents that qualifying is only the beginning of the path, as there's lots of benefits after this.

What support do you need from MDRT, your Region Chair and Global Council Member?

I think some direct contacts or emails to the biggest companies in our area from headquarters sure will help. More and more marketing materials and still waiting for the video to send it to everyone.

Additional Comments:

In my area the team are working in excellent way Lebanon, UAE, Pakistan and South Africa. Also we're contacting some agents and management in different territory, like Kuwait, Egypt and Romania. The efforts that the team is doing sure will bring more members in the coming years. And the team also working to promote MDRT Global Conference in Dubai and telling all agents to qualify or at least being aspirants that they can apply for attending the meeting in Dubai. And we're promoting MDRT in different events, Example: Lebanon –in Beirut Life Insurance Summit that gather almost 800 attendees from six countries and most of the speakers were MDRT members or MDRT Speakers.

UAE: they are doing almost every month a road show gather different companies, agents and brokers.
South Africa: The country chair is travelling from one area to another and meeting with the big companies and high managements positions. Pakistan: He's also doing good job. Most of the agents are receiving emails about the MDRT Days that are happening around us, like Cyprus, Greece and Budapest life insurance summit that helped and still growing the numbers there.

Member Recognition: Recognize members whose contributions exceeded expectations. Provide examples. Identify the top three candidates to be considered as your successor.

Leena Parwani: Is doing a great work, from promoting, to road shows, to meeting new companies and involve the old members.

MEMBERSHIP COMMUNICATIONS DIVISION 1
ZONE 12 – MIDDLE EAST/AFRICA

Rima Antonios: Is doing a wonderful job, visiting companies and brokers, doing meetings for the team on monthly basis and she prepared a kind of a study group for small gathering to negotiate topics from MDRT. She's great leader also.

I'm so happy from both of them for their contributions and dedications for MDRT. They are a true MDRT people.

REGION CHAIR COMMENTS:

It is heartening to see that MCC leaders put their heart and soul in fulfilling their responsibilities and thus setting an excellent example for their team.

- Zone 12 is a vast region with many countries. The activities done by MCC members, as well as success stories of one country must be circulated in other countries of this zone
- Short video recording of activities done can be circulated and it will have a very positive effect on other MCC members
- More emphasis needs to be given on Study Circles and tools of MDRT e.g. MDRT Resource Zone, *RTT* magazine, MDRT app, Sales Ideas, MDRT blog - an excellent learning tool for non-members too
- All these tools will help to improve the engagement level
- Some mechanism needs to be developed to track activity on monthly basis
- Let me also admit I need to establish regular communication with Naji. Which I will certainly do.

GLOBAL COUNCIL MEMBER COMMENTS:

- Emails to the bigger companies in their region from headquarters will help. More and more marketing materials and still waiting for the video to send it to everyone
- Short video recording of activities done can be circulated and it will have a very positive effect on other MCC members
- Some mechanism to be developed to track activity on a monthly basis
- Touching base with new countries Kuwait, Egypt and Romania

MCC Business Plan Reporting Template

Country: _____ **PAKISTAN** _____

2019-2020 Organizational Year (1 September 2019 – 31 August 2020)

Activity #1

Please complete for each of the primary activities that you are planning for the upcoming organizational year. This form will provide MDRT and MCC leadership with the knowledge and understanding of the work that you and your Each Chair is asked to establish a maximum of three activities for implementation (please utilize tabs below).

	<u>1st REPORT due 30 September, 2020</u>
*ACTIVITY:	To establish study circle for top management of different companies, followed by road shows.
*Pillar (Identify the pillar that this activity supports)	<input type="radio"/> GROWTH <input type="radio"/> RETENTION <input checked="" type="radio"/> ENGAGEMENT
*DESCRIPTION (Provide a brief description of activity planned):	Bringing management gurus on one page to promote MDRT and its ethics.
*MDRT STRATEGIC PLATFORM SUPPORTED (Identify platform(s):	<input type="checkbox"/> CELEBRATING ACHIEVEMENT <input checked="" type="checkbox"/> GUIDED DEVELOPMENT <input checked="" type="checkbox"/> STRONGER TOGETHER <input type="checkbox"/> TRANSFORMATIVE PRODUCTIVITY
*SCHEDULED DATE(s): When will the activity occur	1st week of every quarter.
*IMPLEMENTATION/TIMELINE (Outline the process/steps planned, timeline and personnel (staff, vender and member volunteer) resources required)	All the marketing material from MDRT HQ. Presentations, where we will talk about what MDRT is. Qualification for MDRT memebership. MDRT core values. Member benefits and mentoring program.

<p>*PRIMARY TARGET MARKET/AUDIENCE (member/non-member, specific demographics such as region, age, membership years, membership type, etc.):</p>	<p>Heads of company or sales force, who can influence aspirants.</p>
<p>SECONDARY TARGET MARKET/AUDIENCE:</p>	<p>30 Aspirants from every company.</p>
<p>*GOAL & SUCCESS MEASUREMENTS (identify specific, quantitative, measurable success goals):</p>	<p>Goal is to engage managers and give them opportunity to get influenced by the idea of MDRT's whole person concept and then to influence their consultants in their particular company.</p>
<p>*NEEDS ANALYSIS (Please share quantifiable data that supports the request)</p>	
<p>*BUDGET:</p>	<p><input checked="" type="checkbox"/> NONE</p> <p><input type="checkbox"/> Request MCC Budget (Outline budgets needs and rational; reach out to your Zone and Region Chair to submit budget request)</p> <p><input type="checkbox"/> Request Additional Budget (Outline budgets needs and rational; reach out to your Zone and Region Chair to submit budget request)</p>
<p>*OUTLINE OF BUDGET NEEDS (if requested):</p>	<p>As we will be using premises of local company only then not much expense would be incurred and the company would be responsible for hospitality of the participants.</p>

WHAT SUPPORT DO YOU NEED FROM MDRT:	Marketing material and presentations.
*List alternate approaches that were considered and reasons for choosing proposed activity.	As in Paksitan, only EFU Life supports MDRT and its vision . So core purpose is to involve other companies as well . Hence at start, meeting company heads individually and creating study circle is the main purpose of the proposed activity.

MCC Business Plan Reporting Template

Country: UAE

2019-2020 Organizational Year (1 September 2019 – 31 August 2020)

Activity #1

Please complete for each of the primary activities that you are planning for the upcoming organizational year. This form will provide MDRT and MCC leadership with the knowledge and understanding of the work that you and your team will be doing so that we can better support Each Chair is asked to establish a maximum of three activities for implementation (please utilize tabs below).

1st REPORT due 30 September, 2020	
*ACTIVITY:	MDRT Roadshow 2019, UAE
*Pillar (Identify the pillar that this activity supports)	<input checked="" type="radio"/> GROWTH <input type="radio"/> RETENTION <input type="radio"/> ENGAGEMENT
*DESCRIPTION (Provide a brief description of activity planned):	MDRT Roadshow Speaker: Leena Parwani and another MCC member/volunteer will engage with new brokers and insurance providers to share benefits of being member and encourage members to attend MDRT 2020 Global meet in UAE
*MDRT STRATEGIC PLATFORM SUPPORTED (Identify platform(s):	<input checked="" type="checkbox"/> CELEBRATING ACHIEVEMENT <input checked="" type="checkbox"/> GUIDED DEVELOPMENT <input checked="" type="checkbox"/> STRONGER TOGETHER <input type="checkbox"/> TRANSFORMATIVE PRODUCTIVITY
*SCHEDULED DATE(s): When will the activity occur	Each month one event - September road show is done and Oct is planned already.

<p>*IMPLEMENTATION/TIMELINE (Outline the process/steps planned, timeline and personnel (staff, vender and member volunteer) resources required)</p>	<ol style="list-style-type: none"> 1. MDRT MCC member meeting to volunteer the road show 2. Prepare a specific agenda 3. Venues are at no cost to be used, in the case of road show it will be office of host. 4. We also arrange local speaker to motivate and testify benefits 5. Roadshow invite within the company where roadshow is taking place is sent by host
<p>*PRIMARY TARGET MARKET/AUDIENCE (member/non-member, specific demographics such as region, age, membership years, membership type, etc.):</p>	<p>Non Members and existing members those need to be encouraged to attend the meeting.</p>
<p>SECONDARY TARGET MARKET/AUDIENCE:</p>	<p>Aspirants, Agency managers - for MDRT Global meet in Dubai, 2020</p>

<p>*GOAL & SUCCESS MEASUREMENTS (identify specific, quantitative, measurable success goals):</p>	<p>*Goal : 1.To retain existing members. To engage MDRT existing members in MDRT event /roadshow so they could learn more about the benefits of attending MDRT meet each year. 2. To attract new non-members: Support and provide qualifying criteria to aspirants to help them become members. *Measurability: 1. Results can be measured with response/feedback from MCC members and the target audience 2. Number of new member registrations and support asked from the broker organisations</p>
<p>*NEEDS ANALYSIS (Please share quantifiable data that supports the request)</p>	
<p>*BUDGET:</p>	<p><input checked="" type="checkbox"/> NONE <input type="checkbox"/> Request MCC Budget (Outline budgets needs and rational; reach out to your Zone and Region Chair to submit budget request) <input type="checkbox"/> Request Additional Budget (Outline budgets needs and rational; reach out to your Zone and Region Chair to submit budget request)</p>
<p>*OUTLINE OF BUDGET NEEDS (if requested):</p>	<p>No budget required</p>
<p>WHAT SUPPORT DO YOU NEED FROM MDRT:</p>	<p>Resources/materials like presentation, 2019 video of MDRT President</p>

***List alternate approaches that were considered and reasons for choosing proposed activity.**

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MCC Business Plan Reporting Template

Country: UAE

2019-2020 Organizational Year (1 September 2019 – 31 August 2020)

Activity #2

Please complete for each of the primary activities that you are planning for the upcoming organizational year. This form will provide MDRT and MCC leadership with the knowledge and understanding of the work that you and your Each Chair is asked to establish a maximum of three activities for implementation (please utilize tabs below).

<u>1st REPORT due 30 September, 2020</u>	
*ACTIVITY:	MDRT Diwali Networking lunch 2019, UAE
*Pillar (Identify the pillar that this activity supports)	<input type="radio"/> GROWTH <input checked="" type="radio"/> RETENTION <input type="radio"/> ENGAGEMENT
*DESCRIPTION (Provide a brief description of activity planned):	Event planned to celebrate achievement with the major Indian festival celebration
*MDRT STRATEGIC PLATFORM SUPPORTED (Identify platform(s):	<input checked="" type="checkbox"/> CELEBRATING ACHIEVEMENT <input type="checkbox"/> GUIDED DEVELOPMENT <input type="checkbox"/> STRONGER TOGETHER <input type="checkbox"/> TRANSFORMATIVE PRODUCTIVITY
*SCHEDULED DATE(s): When will the activity occur	Tentatively 24 October 2019

<p>*IMPLEMENTATION/TIMELINE (Outline the process/steps planned, timeline and personnel (staff, vender and member volunteer) resources required)</p>	<p>MCC member will plan collectively : Only members allowed to attend and will be given prior invite to save the date. Pre fix venue for lunch and we are managing the event at no cost to members. Company staff and MCC volunteers to be engaged in preparation.</p>
<p>*PRIMARY TARGET MARKET/AUDIENCE (member/non-member, specific demographics such as region, age, membership years, membership type, etc.):</p>	<p>MDRT UAE members</p>
<p>SECONDARY TARGET MARKET/AUDIENCE:</p>	<p>Aspirant - this event will spread the news on MCC activities</p>

<p>*GOAL & SUCCESS MEASUREMENTS (identify specific, quantitative, measurable success goals):</p>	<p>*Goal: To bring the members together under one roof to celebrate an auspicious day. This is a part of member engagement and retention</p>
<p>*NEEDS ANALYSIS (Please share quantifiable data that supports the request)</p>	<p>In past there has not been a networking opportunity for the members in town and, therefore, engagement is missing and so as the retention effected, we came up with this event to retain members and celebrate achievement at minimum cost.</p>
<p>*BUDGET:</p>	<p><input checked="" type="checkbox"/> NONE</p> <p><input type="checkbox"/> Request MCC Budget (Outline budgets needs and rational; reach out to your Zone and Region Chair to submit budget request)</p> <p><input type="checkbox"/> Request Additional Budget (Outline budgets needs and rational reach out to your Zone and Region Chair to submit budget request)</p>
<p>*OUTLINE OF BUDGET NEEDS (if requested):</p>	<p>Event is being sponsored by one of the local product providers by name Investors Trust, as providers wish to sponsor an specific amount, therefore, invite is limited to first come fist serve. We have budgeted USD 1300 or less, each members cost is negotiated at venue which is no longer USD 25 per person and we are expecting 30 to 40 attendees for the same</p>
<p>WHAT SUPPORT DO YOU NEED FROM MDRT:</p>	<p>Any promotional material if - suitable for such event. And your consent for the third party to sponsor. We have seen in the past when we invited last year to members at their cost, we hardly got any confirmation and, therefore, we decided to bring Investor Trust to sponsor the lunch.</p>

***List alternate approaches that were considered and reasons for choosing proposed activity.**

Family Fun Day was considered earlier

MCC Business Plan Reporting Template

Country: UAE

2019-2020 Organizational Year (1 September 2019 – 31 August 2020)

Activity #3

Please complete for each of the primary activities that you are planning for the upcoming organizational year. This form will provide MDRT and MCC leadership with the knowledge and understanding of the work that you and your Each Chair is asked to establish a maximum of three activities for implementation (please utilize tabs below).

<u>1st REPORT due 30 September, 2020</u>	
*ACTIVITY:	Taste of MDRT
*Pillar (Identify the pillar that this activity supports)	<input checked="" type="radio"/> GROWTH <input type="radio"/> RETENTION <input type="radio"/> ENGAGEMENT
*DESCRIPTION (Provide a brief description of activity planned):	We conduct this event to have MDRT speaker sharing tips and sales ideas to new and existing members and aspirants to create value to them with MDRT.
*MDRT STRATEGIC PLATFORM SUPPORTED (Identify platform(s):	<input type="checkbox"/> CELEBRATING ACHIEVEMENT <input checked="" type="checkbox"/> GUIDED DEVELOPMENT <input type="checkbox"/> STRONGER TOGETHER <input type="checkbox"/> TRANSFORMAIVE PRODUCTIVITY
*SCHEDULED DATE(s): When will the activity occur	12/1/2019 (such event is scheduled at least twice a year)

<p>*IMPLEMENTATION/TIMELINE (Outline the process/steps planned, timeline and personnel (staff, vender and member volunteer) resources required)</p>	<p>We have done the similar event in the past with huge success, as we have no cost to attendees and it creates value and encourage and support attendees to achieve qualification of MDRT</p>
<p>*PRIMARY TARGET MARKET/AUDIENCE (member/non-member, specific demographics such as region, age, membership years, membership type, etc.):</p>	<p>Existing members and new members</p>
<p>SECONDARY TARGET MARKET/AUDIENCE:</p>	<p>Aspirants</p>

<p>*GOAL & SUCCESS MEASUREMENTS (identify specific, quantitative, measurable success goals):</p>	<p>Helping attendees to achieve qualification for MDRT membership to transform their lives as mine.</p>
<p>*NEEDS ANALYSIS (Please share quantifiable data that supports the request)</p>	<p>Such events are needed to continue to retain members and create opportunity for new members to be part of MDRT</p>
<p>*BUDGET:</p>	<p> <input type="checkbox"/> NONE <input checked="" type="checkbox"/> Request MCC Budget (Outline budgets needs and rational; reach out to your Zone and Region Chair to submit budget request) <input type="checkbox"/> Request Additional Budget (Outline budgets needs and rational; reach out to your Zone and Region Chair to submit budget request) </p>
<p>*OUTLINE OF BUDGET NEEDS (if requested):</p>	<p>Maximum of USD 250 to 350 in a year</p>
<p>WHAT SUPPORT DO YOU NEED FROM MDRT:</p>	

***List alternate approaches that were considered and reasons for choosing proposed activity.**

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MCC Business Plan Reporting Template

Country: UAE

2019-2020 Organizational Year (1 September 2019 – 31 August 2020)

Activity #4

Please complete for each of the primary activities that you are planning for the upcoming organizational year. This form will provide MDRT and MCC leadership with the knowledge and understanding of the work that you and your Each Chair is asked to establish a maximum of three activities for implementation (please utilize tabs below).

<u>1st REPORT due 30 September, 2020</u>	
*ACTIVITY:	Members Interview - for social media
*Pillar (Identify the pillar that this activity supports)	<p>GROWTH</p> <p><input checked="" type="radio"/> RETENTION</p> <p>ENGAGEMENT</p>
*DESCRIPTION (Provide a brief description of activity planned):	This is going to be activity for the full year as and when we do these interviews
*MDRT STRATEGIC PLATFORM SUPPORTED (Identify platform(s):	<p><input checked="" type="checkbox"/> CELEBRATING ACHIEVEMENT</p> <p><input checked="" type="checkbox"/> GUIDED DEVELOPMENT</p> <p><input type="checkbox"/> STRONGER TOGETHER</p> <p><input type="checkbox"/> TRANSFORMAIVE PRODUCTIVITY</p>
*SCHEDULED DATE(s): When will the activity occur	<p>Every month</p> <p><input type="checkbox"/></p>

<p>*IMPLEMENTATION/TIMELINE (Outline the process/steps planned, timeline and personnel (staff, vender and member volunteer) resources required)</p>	<p>We are requesting members to share how they are benefited by attending MDRT meetings and how they got benefits in terms of growing their business</p>
<p>*PRIMARY TARGET MARKET/AUDIENCE (member/non-member, specific demographics such as region, age, membership years, membership type, etc.):</p>	<p>Existing members and new members</p>
<p>SECONDARY TARGET MARKET/AUDIENCE:</p>	<p>Aspirants</p>

<p>*GOAL & SUCCESS MEASUREMENTS (identify specific, quantitative, measurable success goals):</p>	<p>Helping attendees to achieve qualification for MDRT membership to transform their lives as mine.</p>
<p>*NEEDS ANALYSIS (Please share quantifiable data that supports the request)</p>	<p>Such activities are needed to spread the benefits of being members as social media is used as influencer</p>
<p>*BUDGET:</p>	<p>NONE Request MCC Budget (Outline budgets needs and rational; reach out to your Zone and Region Chair to submit budget request) <input type="checkbox"/> Request Additional Budget (Outline budgets needs and rational; reach out to your Zone and Region Chair to submit budget request)</p>
<p>*OUTLINE OF BUDGET NEEDS (if requested):</p>	<p><input type="checkbox"/> Budget needed <input type="checkbox"/></p>
<p>WHAT SUPPORT DO YOU NEED FROM MDRT:</p>	

***List alternate approaches that were considered and reasons for choosing proposed activity.**

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MCC Business Plan Reporting Template

Country: _____ Lebanon _____

2019-2020 Organizational Year (1 September 2019 – 31 August 2020)

Activity#1

Please complete for each of the primary activities that you are planning for the upcoming organizational year. This form will provide MDRT and MCC leadership with the knowledge and understanding of the work that you and your Each Chair is asked to establish a maximum of three activities for implementation (please utilize tabs below).

1st REPORT due 30 September, 2020	
*ACTIVITY:	Study Group
*Pillar (Identify the pillar that this activity supports)	<input type="radio"/> GROWTH <input type="radio"/> RETENTION <input checked="" type="radio"/> ENGAGEMENT
*DESCRIPTION (Provide a brief description of activity planned):	Starting a study group involving all the MDRT members and invite the prospective members to the meeting .
*MDRT STRATEGIC PLATFORM SUPPORTED (Identify platform(s):	<input type="checkbox"/> CELEBRATING ACHIEVEMENT <input type="checkbox"/> GUIDED DEVELOPMENT <input checked="" type="checkbox"/> STRONGER TOGETHER <input type="checkbox"/> TRANSFORMATIVE PRODUCTIVITY
*SCHEDULED DATE(s): When will the activity occur	It is a quarterly event, starting date is November 2019

<p>*IMPLEMENTATION/TIMELINE (Outline the process/steps planned, timeline and personnel (staff, vender and member volunteer) resources required)</p>	<p>Two hours meeting every quarter, the subjects are scheduled in advance and a pre meeting assignment will be sent one week before the meeting. It will be held in a conference room equipped and coffee will be served during the meeting. The MCC members will prepare for the meeting. The cost of the event will be paid by the audience.</p>
<p>*PRIMARY TARGET MARKET/AUDIENCE (member/non-member, specific demographics such as region, age, membership years, membership type, etc.):</p>	<p>The active MDRT members are mainly the audience and an invitation will be sent to the old members, everyone has the right to invite a prospective member or aspirant.</p>
<p>SECONDARY TARGET MARKET/AUDIENCE:</p>	

<p>*GOAL & SUCCESS MEASUREMENTS (identify specific, quantitative, measurable success goals):</p>	<p>A followup questionnaire will be sent to all attendees asking for their feedback. The level of commitment for the future meetings will be the measurement of success of this activity.</p>
<p>*NEEDS ANALYSIS (Please share quantifiable data that supports the request)</p>	
<p>*BUDGET:</p>	<p><input checked="" type="checkbox"/> NONE</p> <p><input type="checkbox"/> Request MCC Budget (Outline budgets needs and rational; reach out to your Zone and Region Chair to submit budget request)</p> <p><input type="checkbox"/> Request Additional Budget (Outline budgets needs and rational; reach out to your Zone and Region Chair to submit budget request)</p>
<p>*OUTLINE OF BUDGET NEEDS (if requested):</p>	
<p>WHAT SUPPORT DO YOU NEED FROM MDRT:</p>	<p>We already received the outline of the Study Group Best Practices, will need your support suggesting the subjects to discuss and to share different ideas from the MDRT members.</p>

***List alternate approaches that were considered and reasons for choosing proposed activity.**

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MCC Business Plan Reporting Template

South Africa

2019-2020 Organizational Year (1 September 2019 – 31 August 2020)

Activity #1

Please complete for each of the primary activities that you are planning for the upcoming organizational year. This form will provide MDRT and MCC leadership with the knowledge and understanding of the work that you and your Each Chair is asked to establish a maximum of three activities for implementation (please utilize tabs below).

<u>1st REPORT due 30 September, 2020</u>	
*ACTIVITY:	Company Workshop Roadshow
*Pillar (Identify the pillar that this activity supports)	<input type="radio"/> GROWTH <input type="radio"/> RETENTION <input checked="" type="radio"/> ENGAGEMENT
*DESCRIPTION (Provide a brief description of activity planned):	Engage Life Assurance companies on exposure of the MDRT at their meetings, with special reference to Sanlam Life.
*MDRT STRATEGIC PLATFORM SUPPORTED (Identify platform(s):	<input type="checkbox"/> CELEBRATING ACHIEVEMENT <input checked="" type="checkbox"/> GUIDED DEVELOPMENT <input type="checkbox"/> STRONGER TOGETHER <input checked="" type="checkbox"/> TRANSFORMATIVE PRODUCTIVITY
*SCHEDULED DATE(s): When will the activity occur	12-Sep-19

<p>*IMPLEMENTATION/TIMELINE (Outline the process/steps planned, timeline and personnel (staff, vender and member volunteer) resources required)</p>	<p>Jan 2020 Kick Off function</p>
<p>*PRIMARY TARGET MARKET/AUDIENCE (member/non-member, specific demographics such as region, age, membership years, membership type, etc.):</p>	<p>The primary target for this activity is aspirant non members, irrespective of age, production level and social orientation because very few - if none at all are MDRT members.</p>
<p>SECONDARY TARGET MARKET/AUDIENCE:</p>	

<p>*GOAL & SUCCESS MEASUREMENTS (identify specific, quantitative, measurable success goals):</p>	<p>The number increase of MDRT members in South Africa, from the total number of 49 in 2019.</p>
<p>*NEEDS ANALYSIS (Please share quantifiable data that supports the request)</p>	<p>Tied Agents:Liberty Lfe: 20. Sanlam Life :2. Discovery: 1. Momentum: 1. Independent Financial Advisors:</p>
<p>*BUDGET:</p>	<p><input type="checkbox"/> NONE</p> <p><input checked="" type="checkbox"/> Request MCC Budget (Outline budgets needs and rational; reach out to your Zone and Region Chair to submit budget request)</p> <p><input type="checkbox"/> Request Additional Budget (Outline budgets needs and rational; reach out to your Zone and Region Chair to submit budget request)</p>
<p>*OUTLINE OF BUDGET NEEDS (if requested):</p>	<p>Air fares to and from Johannesburg to Cape Town as well as airport transfers and overnight accommodation.</p>
<p>WHAT SUPPORT DO YOU NEED FROM MDRT:</p>	<p>Introductory letter from MDRT to Life Assurance companies in South Africa, not only for the country chair, but for other MCC portfolio holders, Company Chair, Regional Chair, Local Chair.</p>

***List alternate approaches that were considered and reasons for choosing proposed activity.**

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MCC Business Plan Reporting Template

South Africa

2019-2020 Organizational Year (1 September 2019 – 31 August 2020)

Activity #2

Please complete for each of the primary activities that you are planning for the upcoming organizational year. This form will provide MDRT and MCC leadership with the knowledge and understanding of the work that you and your Each Chair is asked to establish a maximum of three activities for implementation (please utilize tabs below).

<u>1st REPORT due 30 September, 2020</u>	
*ACTIVITY:	MDRT lunch for members and aspirants.
*Pillar (Identify the pillar that this activity supports)	<input checked="" type="radio"/> GROWTH <input type="radio"/> RETENTION <input type="radio"/> ENGAGEMENT
*DESCRIPTION (Provide a brief description of activity planned):	Will ask existing MDRT to bring at least one Aspirant member to the meeting
*MDRT STRATEGIC PLATFORM SUPPORTED (Identify platform(s):	<input type="checkbox"/> CELEBRATING ACHIEVEMENT <input type="checkbox"/> GUIDED DEVELOPMENT <input checked="" type="checkbox"/> STRONGER TOGETHER <input type="checkbox"/> TRANSFORMATIVE PRODUCTIVITY
*SCHEDULED DATE(s): When will the activity occur	Feb-20

<p>*IMPLEMENTATION/TIMELINE (Outline the process/steps planned, timeline and personnel (staff, vender and member volunteer) resources required)</p>	<p>Identify the appropriate venue for the meeting. Get agreement from the MCC Country South Africa with the agenda for the day. Clarify the catering position of the day - if each person will buy food /drinks for themselves. Send invitations to all that we can access their contact details, using data from MDRT MCC records. Prepare MDRT Flyers - from MDRT or locally. Ensure that a record is kept of all attendees. Send a thank you message after the event.</p>
<p>*PRIMARY TARGET MARKET/AUDIENCE (member/non-member, specific demographics such as region, age, membership years, membership type, etc.):</p>	<p>The 2020 MDRT Annual Meeting in Anaheim in California USA, and or the 2020 Global Confrence in Dubai.</p>
<p>SECONDARY TARGET MARKET/AUDIENCE:</p>	

<p>*GOAL & SUCCESS MEASUREMENTS (identify specific, quantitative, measurable success goals):</p>	<p>Will still get the by-in from the general MCC country team</p>
<p>*NEEDS ANALYSIS (Please share quantifiable data that supports the request)</p>	<p>Same as activity one</p>
<p>*BUDGET:</p>	<p><input checked="" type="checkbox"/> NONE</p> <p><input type="checkbox"/> Request MCC Budget (Outline budgets needs and rational; reach out to your Zone and Region Chair to submit budget request)</p> <p><input type="checkbox"/> Request Additional Budget (Outline budgets needs and rational reach out to your Zone and Region Chair to submit budget request)</p>
<p>*OUTLINE OF BUDGET NEEDS (if requested):</p>	<p>Will determine it soon after the MCC</p>
<p>WHAT SUPPORT DO YOU NEED FROM MDRT:</p>	

***List alternate approaches that were considered and reasons for choosing proposed activity.**

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MEMBERSHIP COMMUNICATIONS DIVISION 1
ZONE 13 – Oceania

OBJECTIVE:

Actively promote MDRT membership to current and potential members worldwide. Monitor industry activities and involvement worldwide, and serve as a two-way communication link between MDRT leadership and the membership at large. Convey MDRT information to members and potential members through companies and industry associations.

PARTICIPANTS

ExCom Liaison(s):	Randy L. Scritchfield, CFP, LUTCF, Damascus, Maryland, USA Peggy Tsai, RFP, CCFP, Taipei, Taiwan
Global Council Member:	Priti Ajit Kucheria, LUTCF, CFP, Mumbai, India
Region Chair:	Mathew Thomas Fogarty, CFP, Dip FP, Moorabbin, Victoria, Australia
Zone Chair:	Adam McCann, CFP, DFP, Adelaide, South Australia, Australia
Staff Liaison:	Eryn Carter, CAE

ZONE 13 CHAIR

What do you see as your biggest challenge for the upcoming year?

The biggest challenge both in Australia and New Zealand is the disruption of increased regulation and higher education standards. This is impacting both advisors and sponsor partners.

We are finding that both maintaining and establishing sponsor/partners relationship significantly more of a challenge than in previous periods. Life insurance companies are at present less inclined to offer sponsorship as both a partner/sponsors and attending events. There is a direct correlation between the level of partner engagement and advisor engagement. Without the support of sponsor partners, we have less success in members and advisors attending local events. Local events have historically been the most effective means of educating advisors of the benefit of MDRT membership.

Companies and advisors are very introspective at present. The focus is on dealing with the changes as a result of increased regulation. Other industry associations such as the FPA and AFA are experiencing the same trend, with a fall in the number attendees at meetings and conferences.

What support do you need from MDRT, your Region Chair and Global Council Member?

One of the most effective ways MDRT can support Oceania is to bring qualification for membership in line with remuneration models in this region. Membership at all levels, in particular in Australia, are becoming more difficult to achieve. We would be keen to work with MDRT to explore ways to bring qualification in line with the new environment in Oceania.

Additional Comments:

Member Recognition: Recognize members whose contributions exceeded expectations. Provide examples. Identify the top three candidates to be considered as your successor.

Jenny Brown has been the standout performer in this region. Her role as Australian Chair has been completed exceptionally. She also sits on a range of other committees.

MEMBERSHIP COMMUNICATIONS DIVISION 1
ZONE 13 – Oceania

Jenny Brown is the most appropriate candidate as my successor. Others who may be considered would be Amanda Cassar, Aaron Kane and Terry Johnson. Jenny Brown is by far the lead candidate due to her experience as a country chair (Australian Chair) and based on her contribution and commitment to the roles she has served on.

REGION CHAIR COMMENTS:

Oceania Chair Adam delivered his report to me on time, despite New Zealand chair providing the report late. Adam, in his second year, has done a fantastic job in his role of Oceania Chair as well as the complexity involved in running a chapter (and complying with chapter agreement) and ensuring all financial matters are in order.

Jenny Brown and her team have done an excellent job in running a number of events around the country. They continue to receive support from company sponsors despite the significant regulatory change, resulting in advisors either exiting the profession, focusing on retaining their businesses or focusing on updating their qualifications.

New Zealand has also undergone regulatory change and from a financial sponsorship perspective are struggling. However, Katrina Church has spoken at a number of company provider events.

Both countries have engaged well with media partners – Risk Info in Australia and Good Returns in New Zealand – which actively promotes MDRT, at a local level and both the Annual Meeting and Global Conference in Sydney.

I feel additional support is required for Oceania with all the current regulatory changes making it particularly challenging to qualify within Australia with the removal of investment commissions, reductions in life insurance commissions and a move to fee for service only.

Succession still proves to be a challenge in both countries. In Victoria, Australia, they have a succession model that works smoothly – modelling the committees on that of ExCom.

Both countries provided business plans. Although Oceania has its challenges at present, we have very good leaders who are very well aware of the challenges of members and non-members and they position MDRT as a positive influence and pathway through current regulatory changes.

GLOBAL COUNCIL MEMBER COMMENTS:

- Focus is on dealing with the changes as a result of increased regulation – Elimination of grandfathered commissions, cannot charge the usual 1% fee, etc.
- Requesting relook into the MDRT qualifying criteria, because come January 1, 2020, advisors may go out of business, people could lose up to 40% of their revenues, etc.
- Have engaged well with media partners
- Succession plan in New Zealand is a becoming a challenge

MCC Business Plan Reporting Template

Country: AUSTRALIA

2019-2020 Organizational Year (1 September 2019 – 31 August 2020)

Activity #1

Please complete for each of the primary activities that you are planning for the upcoming organizational year. This form will provide MDRT and MCC leadership with the knowledge and understanding of the work that you and your team will be doing so that we can better support your efforts.

Each Chair is asked to establish a maximum of three activities for implementation (please utilize tabs below).

1st REPORT due 30 September, 2020	
*ACTIVITY:	Roadshow - 5 cities around Australia, goal to get 400 attendees. 3rd and 4th weeks of October 2019. Followed by networking dinner
*Pillar (Identify the pillar that this activity supports)	<input type="radio"/> GROWTH <input type="radio"/> RETENTION <input checked="" type="radio"/> ENGAGEMENT
*DESCRIPTION (Provide a brief description of activity planned):	Resilience to Thrive roadshow, Andrew May and Sharon McClafferty. Advisers within Australia are facing into unprecedented change and upheaval, if we can help them with their mental health and well being, provide them with tools to face into the uncertainty and change then we will have achieved our goal
*MDRT STRATEGIC PLATFORM SUPPORTED (Identify platform(s):	<input type="checkbox"/> CELEBRATING ACHIEVEMENT <input checked="" type="checkbox"/> GUIDED DEVELOPMENT <input checked="" type="checkbox"/> STRONGER TOGETHER <input checked="" type="checkbox"/> TRANSFORMATIVE PRODUCTIVITY
*SCHEDULED DATE(s): When will the activity occur	October 14 through to October 23, 2019

<p>*IMPLEMENTATION/TIMELINE (Outline the process/steps planned, timeline and personnel (staff, vender and member volunteer) resources required)</p>	<p>Started planning 5 months ago, all state chairs to be involved, sponsors are TAL and MLC. Adam and JB to work with other potential sponsors to purchase tables. We have engaged both FPA and AFA and given them tables to help spread the word on what MDRT does</p>
<p>*PRIMARY TARGET MARKET/AUDIENCE (member/non-member, specific demographics such as region, age, membership years, membership type, etc.):</p>	<p>Non-members, along with members to the networking dinners afterwards.</p>
<p>SECONDARY TARGET MARKET/AUDIENCE:</p>	<p>Both members and non-members, the view would be to grow the Australian membership and show them the tools, meetings that MDRT has globally</p>

<p>*GOAL & SUCCESS MEASUREMENTS (identify specific, quantitative, measurable success goals):</p>	<p>Achieve 400 attendees and gain some new engagement from potential members</p>
<p>*NEEDS ANALYSIS (Please share quantifiable data that supports the request)</p>	
<p>*BUDGET:</p>	<p><input checked="" type="checkbox"/> NONE</p> <p><input type="checkbox"/> Request MCC Budget (Outline budgets needs and rational; reach out to your Zone and Region Chair to submit budget request)</p> <p><input type="checkbox"/> Request Additional Budget (Outline budgets needs and rational; reach out to your Zone and Region Chair to submit budget request)</p>
<p>*OUTLINE OF BUDGET NEEDS (if requested):</p>	
<p>WHAT SUPPORT DO YOU NEED FROM MDRT:</p>	
<p>*List alternate approaches that were considered and reasons for choosing proposed activity.</p>	<p>Do nothing or run a local event with member speakers which we have done in each location within Australia already this year</p>

MCC Business Plan Reporting Template

Country: AUSTRALIA

2019-2020 Organizational Year (1 September 2019 – 31 August 2020)

Activity #2

Please complete for each of the primary activities that you are planning for the upcoming organizational year. This form will provide MDRT and MCC leadership with the knowledge and understanding of the work that you and your Each Chair is asked to establish a maximum of three activities for implementation (please utilize tabs below).

	<u>1st REPORT due 30 September, 2020</u>
*ACTIVITY:	Smaller local events in each state of Australia
*Pillar (Identify the pillar that this activity supports)	<input checked="" type="radio"/> GROWTH <input type="radio"/> RETENTION <input type="radio"/> ENGAGEMENT
*DESCRIPTION (Provide a brief description of activity planned):	Run local event in March/April 2020 with member speakers in each city
*MDRT STRATEGIC PLATFORM SUPPORTED (Identify platform(s):	<input type="checkbox"/> CELEBRATING ACHIEVEMENT <input checked="" type="checkbox"/> GUIDED DEVELOPMENT <input type="checkbox"/> STRONGER TOGETHER <input checked="" type="checkbox"/> TRANSFORMATIVE PRODUCTIVITY
*SCHEDULED DATE(s): When will the activity occur	Possibly March/April 2020
*IMPLEMENTATION/TIMELINE (Outline the process/steps planned, timeline and personnel (staff, vender and member volunteer) resources required)	At MCC meeting end October to plan out 2020 events and activities

<p>*PRIMARY TARGET MARKET/AUDIENCE (member/non-member, specific demographics such as region, age, membership years, membership type, etc.):</p>	<p>Both members and non-members, the view would be to grow the Australian membership and show them the tools, meetings that MDRT has globally</p>
<p>SECONDARY TARGET MARKET/AUDIENCE:</p>	
<p>*GOAL & SUCCESS MEASUREMENTS (identify specific, quantitative, measurable success goals):</p>	<p>Secure 2 additional sponsors for Australia to enable us to run these local events successfully</p>
<p>*NEEDS ANALYSIS (Please share quantifiable data that supports the request)</p>	
<p>*BUDGET:</p>	<p><input checked="" type="checkbox"/> NONE <input type="checkbox"/> Request MCC Budget (Outline budgets needs and rational; reach out to your Zone and Region Chair to submit budget request) <input type="checkbox"/> Request Additional Budget (Outline budgets needs and rational reach out to your Zone and Region Chair to submit budget request)</p>
<p>*OUTLINE OF BUDGET NEEDS (if requested):</p>	

WHAT SUPPORT DO YOU NEED FROM MDRT:

***List alternate approaches that were considered and reasons for choosing proposed activity.**

MCC Business Plan Reporting Template

Country: AUSTRALIA

2019-2020 Organizational Year (1 September 2019 – 31 August 2020)

Activity #3

Please complete for each of the primary activities that you are planning for the upcoming organizational year. This form will provide MDRT and MCC leadership with the knowledge and understanding of the work that you and your Each Chair is asked to establish a maximum of three activities for implementation (please utilize tabs below).

	<u>1st REPORT due 30 September, 2020</u>
*ACTIVITY:	Possible webinars and podcast
*Pillar (Identify the pillar that this activity supports)	<input type="radio"/> GROWTH <input type="radio"/> RETENTION <input checked="" type="radio"/> ENGAGEMENT
*DESCRIPTION (Provide a brief description of activity planned):	
*MDRT STRATEGIC PLATFORM SUPPORTED (Identify platform(s):	<input checked="" type="checkbox"/> CELEBRATING ACHIEVEMENT <input checked="" type="checkbox"/> GUIDED DEVELOPMENT <input checked="" type="checkbox"/> STRONGER TOGETHER <input checked="" type="checkbox"/> TRANSFORMATIVE PRODUCTIVITY
*SCHEDULED DATE(s): When will the activity occur	TBD
*IMPLEMENTATION/TIMELINE (Outline the process/steps planned, timeline and personnel (staff, vender and member volunteer) resources required)	Discussion required at MCC meeting in October

<p>*PRIMARY TARGET MARKET/AUDIENCE (member/non-member, specific demographics such as region, age, membership years, membership type, etc.):</p>	<p>New members - whole adviser community within Australia</p>
<p>SECONDARY TARGET MARKET/AUDIENCE:</p>	<p>Members</p>
<p>*GOAL & SUCCESS MEASUREMENTS (identify specific, quantitative, measurable success goals):</p>	
<p>*NEEDS ANALYSIS (Please share quantifiable data that supports the request)</p>	
<p>*BUDGET:</p>	<p><input type="checkbox"/> NONE</p> <p><input type="checkbox"/> Request MCC Budget (Outline budgets needs and rational; reach out to your Zone and Region Chair to submit budget request)</p> <p><input type="checkbox"/> Request Additional Budget (Outline budgets needs and rational; reach out to your Zone and Region Chair to submit budget request)</p>
<p>*OUTLINE OF BUDGET NEEDS (if requested):</p>	

WHAT SUPPORT DO YOU NEED FROM MDRT:

***List alternate approaches that were considered and reasons for choosing proposed activity.**