

MEMBERSHIP COMMUNICATIONS DIVISION 2
ZONE 14 –SOUTHEAST 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:	Sung Man Park, Seoul, Republic of Korea
Region Chair:	Pornprapa Sukrepirom, MBA, Bangkok, Thailand
Zone Chair:	Laura Xue-Fen Hoi, ChFC, AEPP, Singapore, Singapore
Staff Liaison:	Mofya Kabwe

ZONE 14 CHAIR

Biggest challenge for the upcoming year: I just took over this role, so unable to really comment at this point of time. I do not see any big challenge currently, but maybe can comment more on what I hope to be able to do for the zone during my term.

I hope to be able to help standardize certain procedures or ideas across all the countries so that each country in the zone can tap on the different ideas or initiatives being carried out in other countries. To provide an opportunity for the countries to collaborate with each other.

For example, developing a 100 MDRT speaker base for Indonesia to help accelerate the message of MDRT was a great initiative. It could be an idea that might also work and help other countries like Thailand and/or Malaysia.

Another example would be, for Singapore's recent MDRT Day, headquarters helped to upload the videos into Resource Zone. This can be a standard thing going forward for every country's MDRT Day.

Through my various HOP visits to the different countries, I hope to get a better feel of each country's climate and environment and see how I can work with the individual country chairs to address any unique concerns that they may have.

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

It would be helpful if we could have calls (I'm not sure if this will be carried out) between Zone, Region, and Global Council Member, and headquarters (Mofya), to discuss any issues or suggestions on the ground on a regular basis for me to give feedback, if any, or progress reports. This should happen before the calls with the country chairs.

Additional Comments:

NA

MEMBERSHIP COMMUNICATIONS DIVISION 2
ZONE 14 –SOUTHEAST ASIA

Member Recognition:

I am still new.

1. Miliana
2. Glen
3. Not sure yet

REGION CHAIR COMMENTS:

During the past few months, what I can see in the progress from this region is more communication among each country by having a group chat via WhatsApp to share more activities which can be more benefits for each country. We are also helping to standardize any procedures and practices across this region and working closely with zone chairs to help our MCC and members to be more aware of MDRT and spread the MDRT resources to member and companies.

I can see the initiative and energy of MCC leaders during their MCC meeting and doing their business plan to be implemented for this committee year.

GLOBAL COUNCIL MEMBER COMMENTS:

I would like to thank the Zone 14 Chair and Region Chair for their dedication and commitment to action. As you mentioned, building the 100 speaker based in Indonesia will contribute significantly to helping Thailand and Malaysia. This region has great potential for growth as it has many potential MDRT members. Therefore, it is important for you to select the next leaders that represent the region, and when the MDRT culture is mature enough, I think it would be great to separate events for members only from events for non-members.

I also would recommend sharing the concept, lecture themes, and speaker information of MDRT Day of each country with other countries so that ideas can be created for the next event. In order to do this, the country chair can submit a brief report to zone chair or region chair on an MDRT event once the event is over so that the zone chair or region chair can read the translated report. The country chair or zone chair can ask questions to those responsible for the MDRT Day event in each country so that individual countries can adopt and adjust best practices of other countries for their own event.

MCC Business Plan Reporting Template

Country: INDONESIA

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 DAY INDONESIA 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):	Conducting our biggest annual event for non member and member to encourage agents to achieve MDRT and register
*MDRT STRATEGIC PLATFORM SUPPORTED (Identify platform(s):	<input type="checkbox"/> CELEBRATING ACHIEVEMENT <input type="checkbox"/> GUIDED DEVELOPMENT <input type="checkbox"/> STRONGER TOGETHER <input checked="" type="checkbox"/> TRANSFORMATIVE PRODUCTIVITY
*SCHEDULED DATE(s): When will the activity occur	21-Jul-20
*IMPLEMENTATION/TIMELINE (Outline the process/steps planned, timeline and personnel (staff, vender and member volunteer) resources required)	Oct/Nov 2019 : EO pitching Nov/Dec 2019 : sponsor package distributed to insurance companies. Jan 2020 : speakers should be confirmed. Mar 2020 : Sponsor companies completion, start ticket sales June 2020 : PGA volunteer briefing and press conference 21 July 2020 : MDRT Day Indonesia event

<p>*PRIMARY TARGET MARKET/AUDIENCE (member/non-member, specific demographics such as region, age, membership years, membership type, etc.):</p>	<p>Target 5500 people and we expect can to sell group tickets to insurance companies .</p> <p>Participants: non member MDRT and MDRT members. This is the only MDRT event that non member can join. We do hope with this exposure, non member can be encouraged to achieve MDRT and become MDRT member. As the venue will be in Jakarta the capital city, the primary audience will be agents from Jakarta and near Jakarta.</p>
<p>SECONDARY TARGET MARKET/AUDIENCE:</p>	<p>Agents from outside Jakarta</p>
<p>*GOAL & SUCCESS MEASUREMENTS (identify specific, quantitative, measurable success goals):</p>	<p>Goal: 5500 participants and we aim to have 3250 MDRT member in year 2020 and 4500 in year 2021</p>
<p>*NEEDS ANALYSIS (Please share quantifiable data that supports the request)</p>	<p>Many insurance agents in Indonesia haven't known about MDRT. If they attend the MDRT Day, most likely they will be encouraged to achieve MDRT. We got testimonies from MDRT members how they become</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>We define our budget for this event max USD 280,000 (IDR 4 billion). This amount is smaller than last year as we consider to use our MCC money for other activities. Previously 90% of MCC Indonesia money was spent for MDRT Day</p>

WHAT SUPPORT DO YOU NEED FROM MDRT:	Speaker from ExCom and also international speaker whom we can get with minimum cost as we really want to reduce our cost for MDRT Day Indonesia 2020
*List alternate approaches that were considered and reasons for choosing proposed activity.	At first we plan to move the venue into 3500 participants to reduce the cost. However, considering the goal to increase MDRT members into 3250 and 4500 in upcoming years we decided to use the current venue with reduced budget

MCC Business Plan Reporting Template

Country: INDONESIA

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:	FIRST TIME MDRT MEMBERS GATHERING
*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):	<p>A Celebration, Welcoming and Introduction event to MDRT First Timer Members in Indonesia.</p> <p>As we want to congratulate the first timer for their achievement and introduce them what they can maximize with their membership and we hope that they can repeat again their membership</p>
*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	End of March 2020
*IMPLEMENTATION/TIMELINE (Outline the process/steps planned, timeline and personnel (staff, vender and member volunteer) resources required)	<p>Jan 2020: Preparing venue and speaker.</p> <p>Feb 2020 : Registration from members to attend this event.</p> <p>March 2020 : First time MDRT Member Gathering</p>

<p>*PRIMARY TARGET MARKET/AUDIENCE (member/non-member, specific demographics such as region, age, membership years, membership type, etc.):</p>	<p>Primary target : First time MDRT member in Jakarta and nearby</p>
<p>SECONDARY TARGET MARKET/AUDIENCE:</p>	<p>200-250 participants for first time member</p>
<p>*GOAL & SUCCESS MEASUREMENTS (identify specific, quantitative, measurable success goals):</p>	<p>Retention rate is increasing</p>
<p>*NEEDS ANALYSIS (Please share quantifiable data that supports the request)</p>	<p>First time member need guidance how to continue their journey 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>We define the budget for this event will be around USD 10,000-USD 12,000</p>

WHAT SUPPORT DO YOU NEED FROM MDRT:	Speaker from MDRT member from Zone 14 whom we can invite
*List alternate approaches that were considered and reasons for choosing proposed activity.	We considered to conduct in two cities. However, considering resouces (time, money, people) we have, we decide to conduct in Jakarta and use the sosmed to cover the other cities for educating the first time member

MCC Business Plan Reporting Template

Country: INDONESIA

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 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:	BRAINSTORMING SESSION
*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):	Annual review of MDRT Indonesia Committee for year plan and create the great teamwork among the committees
*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"/> TRANSFORMAIVE PRODUCTIVITY
*SCHEDULED DATE(s): When will the activity occur	Mid August 2020

<p>*IMPLEMENTATION/TIMELINE (Outline the process/steps planned, timeline and personnel (staff, vender and member volunteer) resources required)</p>	<p>June 2020 : Itinerary plan July 2020: Registration August 2020 : Brainstorming session trip</p>
<p>*PRIMARY TARGET MARKET/AUDIENCE (member/non-member, specific demographics such as region, age, membership years, membership type, etc.):</p>	<p>MCC Indonesia and our IMC (Indonesia MDRT committee who are our sub MCC)</p>
<p>SECONDARY TARGET MARKET/AUDIENCE:</p>	<p>-</p>

<p>*GOAL & SUCCESS MEASUREMENTS (identify specific, quantitative, measurable success goals):</p>	<p>We are going to have a review result meeting from the whole year event, in order to make another improvement to the following year. The other purpose of this trip is also to strengthen our committee relationship the team building as well.</p>
<p>*NEEDS ANALYSIS (Please share quantifiable data that supports the request)</p>	<p>We are having big team (around 30 people) and we need to have great teamwork</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>USD 7,000</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: MALAYSIA

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:	CEO-MCC BREAKFAST MEETING 2020
*Pillar (Identify the pillar that this activity supports)	<input type="radio"/> GROWTH <input type="radio"/> RETENTION <input type="radio"/> ENGAGEMENT - YES
*DESCRIPTION (Provide a brief description of activity planned):	CEO-MCC BREAKFAST MEETING IS TO ENGAGE ALL INSURANCE COMPANIES CEO AND CAO WITH THE PLANS AND EVENTS FOR MDRT MALAYSIA, AND TELL THEM HOW CAN MDRT MALAYSIA HELP THEIR COMPANY TO GROW THEIR MDRT MEMBERSHP, RETAIN THE OLD AND FURTURE A SUSTAINABLE MDRT CULTURE AND VALUE WITHIN THEIR COMPANY
*MDRT STRATEGIC PLATFORM SUPPORTED (Identify platform(s):	<input type="checkbox"/> CELEBRATING ACHIEVEMENT <input type="checkbox"/> GUIDED DEVELOPMENT - YES <input type="checkbox"/> STRONGER TOGETHER - YES <input type="checkbox"/> TRANSFORMATIVE PRODUCTIVITY
*SCHEDULED DATE(s): When will the activity occur	23RD OCTOBER 2019
*IMPLEMENTATION/TIMELINE (Outline the process/steps planned, timeline and personnel (staff, vender and member volunteer) resources required)	INVITATION EMAIL SENT OUT 27th September 2019, CONFIRMATION FROM CEO BEFORE 14TH OCTOBER, THE MCC WILL RUN THE EVENT, WITH MII SECRETARIAT, NO PGA WLL INVOLVE, THIS EVENT WILL INVOLVE MALAYSIA MCC INTERNAL FUNDS

<p>*PRIMARY TARGET MARKET/AUDIENCE (member/non-member, specific demographics such as region, age, membership years, membership type, etc.):</p>	<p>CEO AND CAO OF ALL INSURANCE COMPANIES WILL ATTEND WITH THEIR TRAINING HEAD SOMETIMES. ALL MCC AND PASSED COUNTRY CHAIR WILL ATTEND.</p>
<p>SECONDARY TARGET MARKET/AUDIENCE:</p>	<p>NIL</p>
<p>*GOAL & SUCCESS MEASUREMENTS (identify specific, quantitative, measurable success goals):</p>	<p>KPI : IS TO GET THE SUPPORT AND COLLABORATION OF ALL THE INSURERS IN SUPPORTING THE MDRT MOVEMENT IN THEIR RESPECTIVE COMPANY, USING THE MDRT VALUE AS THE GOLD STANDARD FOR THEIR AGENCY FORCE. TARGET IS TO GET 12 COMPANIES TO SUPPORT AND SPONSOR THE 3 MAJOR MDRT EVENTS, MDRT 1ST TIMER MEETING, MDRT DAY 2020 AND MALAYSIAN NIGHT @ ANAHEIM.</p>
<p>*NEEDS ANALYSIS (Please share quantifiable data that supports the request)</p>	<p>THIS EVENT IS HELD DURING BUDGET MONTH OF ALL INSURERS TO MAKE SURE COMPANIES ALLOCATED FUNDS FOR MDRT EVENTS AND MAKE MDRT EVENT THEIR CALENDER YEAR EVENT.</p>
<p>*BUDGET:</p>	<p><input type="checkbox"/> ROUND RM 20,000 FOR THE BREAKFAST EVENT AT SHANGRILA HOTEL, <input type="checkbox"/> JALA LUMPUR</p> <p><input type="checkbox"/></p>
<p>*OUTLINE OF BUDGET NEEDS (if requested):</p>	

WHAT SUPPORT DO YOU NEED FROM MDRT:	WE NEED STATISTICAL ANALYTIC REPORT FROM MDRT FOR EACH COMPANY.
*List alternate approaches that were considered and reasons for choosing proposed activity.	

MCC Business Plan Reporting Template

Country: _____ Malaysia _____

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).

1st REPORT due 30 September, 2020	
*ACTIVITY:	MDRT 1ST TIMER MEETING
*Pillar (Identify the pillar that this activity supports)	<input type="radio"/> GROWTH - YES <input type="radio"/> RETENTION - YES <input type="radio"/> ENGAGEMENT - YES
*DESCRIPTION (Provide a brief description of activity planned):	1ST TIMER MEETING IS TO ENGAGE MDRT NEW MEMBERS BY INVITING THEM TO COME FOR A ONCE IN A LIFETIME GATHERING ORGANIZED FOR THEM TO RECOGNIZE THEIR ACHIEVEMENT AS ROOKIE MDRT MEMBERS.
*MDRT STRATEGIC PLATFORM SUPPORTED (Identify platform(s):	<input type="checkbox"/> CELEBRATING ACHIEVEMENT - YES <input type="checkbox"/> GUIDED DEVELOPMENT - YES <input type="checkbox"/> STRONGER TOGETHER <input type="checkbox"/> TRANSFORMATIVE PRODUCTIVITY
*SCHEDULED DATE(s): When will the activity occur	17TH MARCH 2020
*IMPLEMENTATION/TIMELINE (Outline the process/steps planned, timeline and personnel (staff, vender and member volunteer) resources required)	1ST TIMER COMMITTEE IS FORMED WITHIN MCC, HEADED BY A SENIOR MCC MEMBER, WE HAVE SCOUTED THE VENUE, DECIDED ON THE DATE, MII SECRETARIAT WILL ASSIST US, PGA WILL BE INVOLVED AND RECRUITED THROUGH OUR PGA PROGRAM, THIS EVENT WILL BE FULLY FUNDED FOR THE FIRST TIME BY SPOSORSHIP FROM COMPANIES.

<p>*PRIMARY TARGET MARKET/AUDIENCE (member/non-member, specific demographics such as region, age, membership years, membership type, etc.):</p>	<p>1ST TIME MDRT QUALIFIER AROUND MALAYSIA.</p>
<p>SECONDARY TARGET MARKET/AUDIENCE:</p>	<p>NIL</p>
<p>*GOAL & SUCCESS MEASUREMENTS (identify specific, quantitative, measurable success goals):</p>	<p>THIS GATHERING FOR 1ST TIMER IS TO :</p> <ol style="list-style-type: none"> 1. ENGAGE YOUNG MDRT FROM THE START. 2. EDUCATE THEM ON THE VALUES OF MDRT. 3. TO SHOW THEM A GLIMPSE OF THE LIFE OF AN MDRT MEMBER. 4. EDUCATE AND ENCOURAGE THEM TO ATTEND THE ANNUAL MEETING. 5. EDUCATE THEM ON WHAT TO EXPECT AND GO ABOUT DURING ANNUAL MEETING. 6. CREATE A PLATFORM FOR ROOKIE MDRT MEMBERS TO NETWORK.
<p>*NEEDS ANALYSIS (Please share quantifiable data that supports the request)</p>	<p>ROOKIE MDRT THAT ATTEND ANNUAL MEETING HAS A 25% MORE CHANCE TO RETAIN THEIR MDRT MEMBERSHIP THE SECOND YEAR. WE ARE USING THIS TO IMPROVE OUR RETENTION RATE.</p>
<p>*BUDGET:</p>	<p><input type="checkbox"/> HIS EVENT WILL BE FULLY FUNDED BY SPONSORS, WE ARE TALKING TO <input type="checkbox"/> SURERS TO FULL SPONSOR THIS. COST TO RUN IS AROUND RM60,000</p> <p><input type="checkbox"/></p>
<p>*OUTLINE OF BUDGET NEEDS (if requested):</p>	

WHAT SUPPORT DO YOU NEED FROM MDRT:	SPEAKER FROM MDRT HQ, DATA ANALYTICS FROM HQ
*List alternate approaches that were considered and reasons for choosing proposed activity.	

MCC Business Plan Reporting Template

Country: MALAYSIA

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).

1st REPORT due 30 September, 2020	
*ACTIVITY:	MALAYSIA MDRT DAY 2020
*Pillar (Identify the pillar that this activity supports)	<input type="radio"/> GROWTH -YES <input type="radio"/> RETENTION - YES <input type="radio"/> ENGAGEMENT- YES
*DESCRIPTION (Provide a brief description of activity planned):	MALAYSIA MDRT DAY 2020 is the main event for insurance industry in Malaysia, quoted as the best insurance forum in Malaysia. Where top speakers are trained to deliver the best practice and experience to all insurance practitioner in Malaysia.
*MDRT STRATEGIC PLATFORM SUPPORTED (Identify platform(s):	<input type="checkbox"/> CELEBRATING ACHIEVEMENT <input type="checkbox"/> GUIDED DEVELOPMENT - yes <input type="checkbox"/> STRONGER TOGETHER - yes <input type="checkbox"/> TRANSFORMAIVE PRODUCTIVITY - yes
*SCHEDULED DATE(s): When will the activity occur	4th AUGUST, 2020 AT SETIA CONVENTION CENTRE, GREATER KL.
*IMPLEMENTATION/TIMELINE (Outline the process/steps planned, timeline and personnel (staff, vender and member volunteer) resources required)	MCC IS WORKING TOWARDS MDRT DAY FROM NOW ON, VARIOUS COMMITEES FORMED TO RUN THIS PROGRAM SUCH AS PGA, EVEN TEAM, PDC, CHARITY, MARKETING TEAM, SOCIAL MEDIA. IT WILL INVOLVE ALL MCC AND PASSED COUNTRY CHAIRS AND 300 PGAS THIS YEAR.

<p>*PRIMARY TARGET MARKET/AUDIENCE (member/non-member, specific demographics such as region, age, membership years, membership type, etc.):</p>	<p>ALL MDRT MEMBERS AND ASPRIRANT MDRT MEMBERS, SUCH AS LIFE INSURANCE AGENTS, FINANCIAL PLANNERS, INVESTMENT PERSONAL. WE EXPECT A 5000 STRONG CROWD THIS YEAR, DOUBLING OF WHAT WAS RECEIVED LAST YEAR FROM 10 COUNTRIES</p>
<p>SECONDARY TARGET MARKET/AUDIENCE:</p>	<p>ASPIRANT MDRT MEMBERS FROM INDIA, CAMBODIA, AND NEIGHBOURING COUNTRIES.</p>
<p>*GOAL & SUCCESS MEASUREMENTS (identify specific, quantitative, measurable success goals):</p>	<p>THIS MDRT DAY 2020 WILL HAVE 5000 PARTICIPANT, 100% INCREASE FROM LAST YEAR. TARGETED 12 SPONSORS AND HOPEFULLY AN ENDORSEMENT FROM MONEY AUTHORITY AS A KEY EVENT FOR THE FINANCIAL PLANNING INDUSTRY. IT WILL FEATURE 4 LANGUAGE WITH 5 MAIN EVENT, MAIN PLATFORM, FOCUS SESSION, CONNEXION ZONE, CONNERSTONE, PAID BREAKFAST EVENT.</p>
<p>*NEEDS ANALYSIS (Please share quantifiable data that supports the request)</p>	
<p>*BUDGET:</p>	<p><input type="checkbox"/> TARGETED BUDGET IS AROUND RM 850,000 TO RUN THIS EVENT. <input checked="" type="checkbox"/> EXPECTED REVENUE IS 1.8 MILLION. MDRT MCC WILL SPLIT PROFIT WITH OUR CO ORGANIZER-MII. <input type="checkbox"/></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: PHILIPPINES

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 TEA TIME
*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):	For the first time MDRT MCC will be holding an event outside Manila and Cebu, it will be in Cagayan de Oro, so we can also make the MDRT brand and presence known to them
*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	November 21, 2019 (rescheduled from the April 2019 originally planned)
*IMPLEMENTATION/TIMELINE (Outline the process/steps planned, timeline and personnel (staff, vender and member volunteer) resources required)	SEPT: Plotting of schedule for event (checking for company or local events that could possibly conflict with the schedule), looking for venue. OCT: start promotion and registration

<p>*PRIMARY TARGET MARKET/AUDIENCE (member/non-member, specific demographics such as region, age, membership years, membership type, etc.):</p>	<p>It will be open to both members and non members. As a first event in Cagayan de Oro City, we just want to make the MDRT presence known.</p>
<p>SECONDARY TARGET MARKET/AUDIENCE:</p>	
<p>*GOAL & SUCCESS MEASUREMENTS (identify specific, quantitative, measurable success goals):</p>	<p>Attendance of at least 300, increase in 2020 Membership Numbers</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>	

WHAT SUPPORT DO YOU NEED FROM MDRT:	Approval for the event
*List alternate approaches that were considered and reasons for choosing proposed activity.	

MCC Business Plan Reporting Template

Country: PHILIPPINES

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:	2020 MDRT DAY
*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):	A showcase of powerful speakers both international and local to help, inspire and motivate members and nonmembers alike to be 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 checked="" type="checkbox"/> TRANSFORMATIVE PRODUCTIVITY
*SCHEDULED DATE(s): When will the activity occur	July 30, 2020 *subject to availability of speakers
*IMPLEMENTATION/TIMELINE (Outline the process/steps planned, timeline and personnel (staff, vender and member volunteer) resources required)	Q4 2019: finalize lineup of speakers and venue availability. Market to companies for sponsorships. 2020: logistical planning and promotions

<p>*PRIMARY TARGET MARKET/AUDIENCE (member/non-member, specific demographics such as region, age, membership years, membership type, etc.):</p>	<p>Members and non members</p>
<p>SECONDARY TARGET MARKET/AUDIENCE:</p>	
<p>*GOAL & SUCCESS MEASUREMENTS (identify specific, quantitative, measurable success goals):</p>	<p>Number of attendees reaches 2000, increase in MDRT Membership</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>This will be the first MDRT Day that will not have any echoers, we would like to make an impact to all attendees. In order to this we are looking at holding MDRT Day at SMX Convention Center (\$20,000 venue rental only) or Okada Hotel (\$50,000 venue rental with food).</p>

WHAT SUPPORT DO YOU NEED FROM MDRT:	Approval of event, international speaker assistance
*List alternate approaches that were considered and reasons for choosing proposed activity.	

MCC Business Plan Reporting Template

Country: PHILIPPINES

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:	First Time Orientation
*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):	A new event for first-time MDRTs where we will be introducing the value of MDRT, the benefits of being an MDRT, and so that they will be motivated to qualify again for MDRT.
*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	Mar-20
*IMPLEMENTATION/TIMELINE (Outline the process/steps planned, timeline and personnel (staff, venter and member volunteer) resources required)	Preliminary gathering of data regarding first time membership. Final planning in Dec 2019/Jan2020

<p>*PRIMARY TARGET MARKET/AUDIENCE (member/non-member, specific demographics such as region, age, membership years, membership type, etc.):</p>	<p>First time members</p>
<p>SECONDARY TARGET MARKET/AUDIENCE:</p>	
<p>*GOAL & SUCCESS MEASUREMENTS (identify specific, quantitative, measurable success goals):</p>	<p>Retention of these first time members to next year membership</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:	Approval of event
*List alternate approaches that were considered and reasons for choosing proposed activity.	

MCC Business Plan Reporting Template

Country: Thailand

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:	First Timer Celebration
*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):	This half day session will be held around May 2020, after finishing the meetings registration. First time members will be invited to celebrate with the special afternoon tea creation. We will have 2 local speakers to give them some advice to continue and get higher production. They will get souvenir and celebration to recognize their success.
*MDRT STRATEGIC PLATFORM SUPPORTED (Identify platform(s):	CELEBRATING ACHIEVEMENT <input checked="" type="checkbox"/> GUIDED DEVELOPMENT <input type="checkbox"/> STRONGER TOGETHER <input type="checkbox"/> TRANSFORMATIVE PRODUCTIVITY
*SCHEDULED DATE(s): When will the activity occur	Around May 2020
*IMPLEMENTATION/TIMELINE (Outline the process/steps planned, timeline and personnel (staff, vender and member volunteer) resources required)	Feb 2020 - Get the list of first time members and send them invitation, select the speakers Mar 2020 - Finalize the participant number, order souvenir, book the venue May 2020 - First Timer Celebration
*PRIMARY TARGET MARKET/AUDIENCE (member/non-member, specific demographics such as region, age, membership years, membership type, etc.):	First Time members and their mentors at every age from around country.
SECONDARY TARGET MARKET/AUDIENCE:	Company executives/representatives

<p>*GOAL & SUCCESS MEASUREMENTS (identify specific, quantitative, measurable success goals):</p>	<p>We expect first time members will join around 500 pax. We will track them next year how many can continue the membership.</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>Afternoon High Tea at 1,000 THB per pax Souvenir at 350 THB per pax Management Fee 200 at THB per pax</p>
<p>WHAT SUPPORT DO YOU NEED FROM MDRT:</p>	<p>Souvenir First timer list</p>
<p>*List alternate approaches that were considered and reasons for choosing proposed activity.</p>	<p>First time members tetention of Thailand is about 40% last 5years. If we can do this celebration for them and give them some ideas and motivation, I think we can get this rate higher. I expect to be 60% then the overall will also get higher.</p>

MCC Business Plan Reporting Template

Country: Thailand

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).

1st REPORT due 30 September, 2020	
*ACTIVITY:	MDRT Day 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):	Full day session, foreign and local speakers (more foreign speakers than last year). The foreign attendees can join this time. This MDRT Day will be different from last year in terms of atmosphere, light and sound, creativities and many more.
*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	Around July-August 2020
*IMPLEMENTATION/TIMELINE (Outline the process/steps planned, timeline and personnel (staff, vender and member volunteer) resources required)	Nov 2019 - Book the venue, select the event organizer, send invitation to selected speakers Dec 2019 - Finalize the speakers Jan 2020 - Release the poster, sell tickets Feb-May 2020 - Promote the event via media and companies June 2020 - Finalize the number of participants, final brief to event organizer July-Aug 2020 - MDRT Day 2020
*PRIMARY TARGET MARKET/AUDIENCE (member/non-member, specific demographics such as region, age, membership years, membership type, etc.):	Members and non-members (aspirants) from around the country
SECONDARY TARGET MARKET/AUDIENCE:	

<p>*GOAL & SUCCESS MEASUREMENTS (identify specific, quantitative, measurable success goals):</p>	<p>Expected around 3,000 attendees (1,000 more than 2019)</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>Meeting package at 1,500 THB per pax Event organizer, registration system, at 400,000 THB Stage and AV at 150,000 THB other at 50,000 THB</p>
<p>WHAT SUPPORT DO YOU NEED FROM MDRT:</p>	<p>Foreign speakers and ExCom Materials Members' list</p>
<p>*List alternate approaches that were considered and reasons for choosing proposed activity.</p>	<p>This annual event impacts directly to all attendees. This time, we will strengthen it by emphasizing more on academic content that attendees can bring back to use.</p>

MCC Business Plan Reporting Template

Country: Thailand

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:	Contents Connection
*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):	Create academic content, sales ideas, inspirations such as videos then release on Facebook and group of line application to each company.
*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	Twice a month
*IMPLEMENTATION/TIMELINE (Outline the process/steps planned, timeline and personnel (staff, venter and member volunteer) resources required)	Oct 2019 - Planning the contents, interviewers, interviewees Nov 2019 - Booking the places, sent invitation to interviewees Dec 2019 - Filming and editing the clip Jan-Jun 2020 - Release the clip twice a month
*PRIMARY TARGET MARKET/AUDIENCE (member/non-member, specific demographics such as region, age, membership years, membership type, etc.):	Members, aspirants
SECONDARY TARGET MARKET/AUDIENCE:	Insurance agents

<p>*GOAL & SUCCESS MEASUREMENTS (identify specific, quantitative, measurable success goals):</p>	<p>Number of post engagement, number of message read, number of enquiry.</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>Rental Studio, Filming and editing 200,000 baht</p>
<p>WHAT SUPPORT DO YOU NEED FROM MDRT:</p>	<p>No</p>
<p>*List alternate approaches that were considered and reasons for choosing proposed activity.</p>	<p>This content will engage audiences to create more value in being MDRT. They will have role model who can inspire them to qualify to MDRT.</p>

MCC Business Plan Reporting Template

Country : Singapore

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 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:	HOP Visit 2020(To visit the various insurance companies)
*Pillar (Identify the pillar that this activity supports)	Engagement : Purpose is to introduce formally the new term core team and to let them know what we will have in this new term and also seek their voices what support they require of us to promote MDRT awareness /culture to their companies.
*DESCRIPTION (Provide a brief description of activity planned):	Do company visits to various insurance companies. Main companies include AIA, Prudentia , Great Eastern, Manulife, Aviva, NTUC Income
*MDRT STRATEGIC PLATFORM SUPPORTED (Identify platform(s):	Stronger Together
*SCHEDULED DATE(s): When will the activity occur	Mid January 2020
*IMPLEMENTATION/TIMELINE (Outline the process/steps planned, timeline and personnel (staff, vender and member volunteer) resources required)	Main Core Leaders : Delia Wong(Country Chair) , Nadia Wijatno (Head of External Relations) , Ng Wee Cheng (Head of Members Engagement) to visit the companies , also with the company chair representatives in respective companies to come along. As this term's Zone Chair (South East Asia) is Laura Hoi , she will also be physically coming along with us .

<p>*PRIMARY TARGET MARKET/AUDIENCE (member/non-member, specific demographics such as region, age, membership years, membership type, etc.):</p>	<p>Senior Management of the companies (CEO/CAO/Head of Training Department /whoever is in charge of MDRT initiatives & development of consultants</p>
<p>SECONDARY TARGET MARKET/AUDIENCE:</p>	<p>Not applicable</p>
<p>*GOAL & SUCCESS MEASUREMENTS (identify specific, quantitative, measurable success goals):</p>	<p>Specific: to know who we will be getting in touch with during the year, to promote good public relations with the companies</p>
<p>NEEDS ANALYSIS (Please share quantifiable data that supports the</p>	<p>Not applicable</p>
<p>*BUDGET:</p>	<p>NONE</p>
<p>*OUTLINE OF BUDGET NEEDS (if requested):</p>	<p>Not applicable , since no budget is needed</p>

<p>WHAT SUPPORT DO YOU NEED FROM MDRT:</p>	<p>I have not thought of this in concrete details yet. I am thinking if MDRT HQ has some newsletter that we could officially give when we visit. I am also thinking if it would be apt to periodically speak (my core team as well : Nadia Wijatno & Ng Wee Cheng , whereby we take turns to speak at the various companies , we could get our company chairs to organise/liase for u , speaking agenda can be worked upon.</p>
<p>*List alternate approaches that were considered and reasons for choosing proposed activity.</p>	<p>Reason for choosing HOP visits is because we have been doing HOP visits all these years and we wish to continue to do this since it has been effective touch point of building good working relationship with the companies.</p>

MCC Business Plan Reporting Template

Country : Singapore

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 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:	Charity Event 2020(We are planning for January /February 2020, during the Chinese New Year period
*Pillar (Identify the pillar that this activity supports)	Engagement : To promote Whole Person concept in the area of community giving
*DESCRIPTION (Provide a brief description of activity planned):	We will be having an annual planning session on 16 Oct 2019 , we have designated a charity commitee . This commitee will be proposing some definite suggestions to the entire MCC team . We will then pick which we will like to execute for this charity event.
*MDRT STRATEGIC PLATFORM SUPPORTED (Identify platform(s):	Guided development
*SCHEDULED DATE(s): When will the activity occur	January / February 2020 (Chinese New Year Period) , we will finalize the date soon after the 16 Oct 2019 annual planning session.
*IMPLEMENTATION/TIMELINE (Outline the process/steps planned, timeline and personnel (staff, vender and member volunteer) resources required)	Personnel: MCC team members, the past ad hoc volunteers we have used from prior MDRT Day Singapore events for instance. Resources: Beneficiary of the Charity Event, in January 2019, it was SPD (special people with disability) in which we brought approximately 30 children for a McDonald's meal and arranged for games for the children. The designated charity commitee will suggest to the MCC team during the annual planning session which beneficiaries we can consider. Timeline of preparation: Once we have chosen the beneficiary, we will reach out to the beneficiary and each MCC team member will be given different roles by the charity commitee.

<p>*PRIMARY TARGET MARKET/AUDIENCE (member/non-member, specific demographics such as region, age, membership years, membership type, etc.):</p>	<p>Primary Market: Members/Non Members (we will also show on Facebook page about this event to raise awareness of importance of community involvement/giving.</p>
<p>SECONDARY TARGET MARKET/AUDIENCE:</p>	<p>Public (all who access to our MDRT Singapore Facebook page) can view it to raise and promote the good image of MDRT: Whole Person concept.</p>
<p>*GOAL & SUCCESS MEASUREMENTS (identify specific, quantitative, measurable success goals):</p>	<p>Specific : To raise awareness of what MDRT truly means-- it is not just about achieving sales target, it is also about becoming a better person through caring and giving to the community .</p>
<p>NEEDS ANALYSIS (Please share quantifiable data that supports the</p>	<p>Not applicable</p>
<p>*BUDGET:</p>	<p>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>Last year's SPD (special people with disabilities) Charity Event we brought 30 children out for a McDonald's meal with games that we played together with them. We spent approximately \$2500 on this event. Hence, this year, if we are looking at an event of a larger scale, it would be more than this amount surely.</p>

WHAT SUPPORT DO YOU NEED FROM MDRT:	Budget approval once we finalize we will provide the proposal .
*List alternate approaches that were considered and reasons for choosing proposed activity.	The MCC team agreed upon having charity event and we wish to be the FIRST mover and role models to our industry peers on this.

MCC Business Plan Reporting Template

Country : Singapore

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 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 Singapore 2020
*Pillar (Identify the pillar that this activity supports)	Growth, Retention and Engagement (to increase motivation to qualify for MDRT for both qualifiers and aspirants, to retain continued qualification, to engage companies to consider having MDRT culture within their respective companies .
*DESCRIPTION (Provide a brief description of activity planned):	To have both motivation and technical elements. Audience would include advisors and managers and also companies. We also intend to engage external parties like Asia Advisors' Network and MAS(Monetary Authority of Singapore) .
*MDRT STRATEGIC PLATFORM SUPPORTED (Identify platform(s):	CELEBRATING ACHIEVEMENT(for those past & present qualifiers) GUIDED DEVELOPMENT(technical & soft skills , activity management & motivation) STRONGER TOGETHER(motivation & mindset) TRANSFORMATIVE PRODUCTIVITY(skills & mindset/motivation)
*SCHEDULED DATE(s): When will the activity occur	28 July 2020(we plan for this date, however, it is also subject to venue availability. We have started enquiring on venues with our event organiser. We may or may not need to change the planned date. We are currently on waiting list for our venues of choice.

<p>*IMPLEMENTATION/TIMELINE (Outline the process/steps planned, timeline and personnel (staff, vender and member volunteer) resources required)</p>	<p>Sponsorship from insurance companies, PGA volunteers, MCC Company Chairs to raise awareness in terms of event marketing broadcast to the companies they represent, planning in various segments within the MCC team, liasing with the speakers, getting vendors to sponsor the booths, working closely with the event organiser for logistics resources and venue setup etc.</p>
<p>*PRIMARY TARGET MARKET/AUDIENCE (member/non-member, specific demographics such as region, age, membership years, membership type, etc.):</p>	<p>Member and non member (whole insurance industry) , company management staffs (CEO/CAO/senior management)</p>
<p>SECONDARY TARGET MARKET/AUDIENCE:</p>	<p>Asia Advisors' Network & MAS(Monetary Authority of Singapore)</p>
<p>*GOAL & SUCCESS MEASUREMENTS (identify specific, quantitative, measurable success goals):</p>	<p>Target audience size of 1800-2000. Buy in support from insurance companies to increase MDRT membership , increase motivation to advisors to qualify for MDRT.</p>
<p>*NEEDS ANALYSIS (Please share quantifiable data that supports the request)</p>	

<p>*BUDGET:</p>	<p>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>Last year's MDRT Day budget spent was \$450,000 approximately- Venue cost, event setup cost, speakers' cost etc.</p>
<p>WHAT SUPPORT DO YOU NEED FROM MDRT:</p>	<p>To work closely with zone chair and tap on the experiences from country chairs for ideas and from MDRT HQ to provide marketing ideas and strategies.</p>
<p>*List alternate approaches that were considered and reasons for choosing proposed activity.</p>	<p>Last 2 years' MDRT Day Singapore have been hugely well received and we see this event as a dynamic boost to increase MDRT membership in Singapore.</p>

MEMBERSHIP COMMUNICATIONS DIVISION 2
ZONE 2 –CHINA SUMMARY (NORTH)

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:	Sung Man Park, Seoul, Republic of Korea
Region Chair:	Eunice Chen, Taipei, Taiwan
Zone Chair:	Yue Feng, Dongguan, China (South China); Zuo Jun, Nanjing, China (North China)
Staff Liaison:	Jennifer Chen

ZONE 2 CHAIR

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

Membership retention and engagement.

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

Training and guidance on specific tasks.

Additional Comments: None at this time.

Member Recognition: None at this time.

REGION CHAIR COMMENTS:

Mainland China is a vast territory with a large population, thriving economy, booming employment needs and surging purchasing power. People eager to see overnight success. Life insurance sector has been growing rapidly in China.

Based on above factors, there are some issues in the market as well:

1. Since many new insurance companies and brokerage firms have been established within the same short period, poaching has become very serious.
2. Looking for short-term success, do not have a vision for long-term success and build as a life-time career.
3. Most advisors cannot concentrate on life insurance only, but often multi-tasking with other business opportunities.
4. Short-term profit driven, which causes low reputation to their clients.
5. More restricted rules and regulations have been released in the market.
6. MDRT is currently under its registration process in China, some insurance companies have postponed their internal promotion.

MEMBERSHIP COMMUNICATIONS DIVISION 2
ZONE 2 –CHINA SUMMARY (NORTH)

Suggestions:

1. Build networking platform: Select high influence and engaged MDRT members to join MCC, and serve members and potential members in their company.
2. Professionalism is the key: leverage on mentoring program and local activities to share and inherit value of MDRT.
3. Due to the vast size, China has divided into North and South region in this year. If we can integrate the resources, use advanced technologies, social circles, to disseminate positive messages among advisors, the substantial results will naturally follow.
4. Popular fashion: many creative marketing platform, such as “Dou Yin” has been well received in China. If possible, MCC Chairs can recommend and select creative members to make videos about true stories of insurance claims and why insurance is important, then post the videos online to promote the mission of life insurance agents.
5. MDRT roadshows: to be up front and close with advisors, unselfishly share and promote MDRT’s Whole Person concept and its true values.
6. International integration: MDRT President, headquarters and MCCs to visit industry organizations and insurance companies. We can also deploy Ambassadors to share other countries/territories insurance selling best practices, double up the positive result.

GLOBAL COUNCIL MEMBER COMMENTS:

The growth in membership in China is amazing. That also means that more attention is required to maintaining the size of the membership. As China is geographically quite sprawling, using technology to manage the organization will be important, but just as important, if not more, is to create offline gatherings of members.

Being part of MDRT is an honor, but the organization is a school where members strive to maintain and grow MDRT. Therefore, I believe you should set up teams by company and train more leaders. Of course, leaders in the early stage of an organization’s development have to bear the burden of dedication and sacrifice. Even though China is currently divided into North and South, I think you will need more sub-divisions of the region. Members generally love sharing their sales ideas to boost productivity. I think using the MDRT resources would be a good way to do that. It’s also crucial that when you do use those resources, the concept of Whole Person is shared.

China is a region where we can expect significant growth and I look forward to having more active exchanges and communication with China.

MCC Business Plan Reporting Template

Country: China (North)

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:	Improve first-time members' retention, and engage with returned members
*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):	1. Build up MCC Team, create evaluation system; 2. Organize area, local and company activities; 3. Create an effective communication system for chairs to exchange/share information;
*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"/> TRANSFORMATIVE PRODUCTIVITY
*SCHEDULED DATE(s): When will the activity occur	September 2019 - August 2020

<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. September 2019 - November 2019: build and train MCC team. Select 60 members to serve as Area, Local and Company Chairs. Create sub-committees to focus on different functionalities; 2. Create Annual Plan based on each chair's respective area and responsibilities; 3. January 2020 - March 2020: promote/support membership application and meetings registration. Visit key insurance companies to promote MDRT and serve potential members; 4. April 2020 - June 2020: MCC Company Chairs arrange internal MDRT promotion activities, such as MDRT Day, to serve current year members; 5. July 2020 - September 2020: Select new MCC members, and organize local MDRT Day;
<p>*PRIMARY TARGET MARKET/AUDIENCE (member/non-member, specific demographics such as region, age, membership years, membership type, etc.):</p>	<p>First-time members and senior members</p>
<p>SECONDARY TARGET MARKET/AUDIENCE:</p>	<p>Potential members</p>

<p>*GOAL & SUCCESS MEASUREMENTS (identify specific, quantitative, measurable success goals):</p>	<ol style="list-style-type: none"> 1. Increase Annual Meeting and Global Conference attendees from Mainland China; 2. Increase membership engagement by arranging company, local and regional activities, hence secure retention and drive membership growth;
<p>*NEEDS ANALYSIS (Please share quantifiable data that supports the request)</p>	<p>Data from 2019 Annual Meeting and Global Conference</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>Plan to have two local MDRT Day events, projected attendees for each event is about 100-150</p>
<p>WHAT SUPPORT DO YOU NEED FROM MDRT:</p>	<ol style="list-style-type: none"> 1. Arrange MDRT Ambassador to attend the MDRT Day; 2. Provide specific guidance and training; 3. Funding support for the events;

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

Due to the large number of membership in Mainland China, MCC needs to meet on regular basis which can be done through conference calls. This will improve team communication frequency and effectiveness of accomplishing annual plans.

MEMBERSHIP COMMUNICATIONS DIVISION 2
ZONE 2 –CHINA SUMMARY (SOUTH)

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:	Sung Man Park, Seoul, Republic of Korea
Region Chair:	Eunice Chen, Taipei, Taiwan
Zone Chair:	Yue Feng, Dongguan, China (South China); Zuo Jun, Nanjing, China (North China)
Staff Liaison:	Jennifer Chen

ZONE 2 CHAIR

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

Membership retention and engagement.

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

None for now.

Additional Comments: None at this time.

Member Recognition: None at this time.

REGION CHAIR COMMENTS:

Mainland China is a vast territory with large population, thriving economy, booming employment needs, and surging purchasing power. People eager to see overnight success. Life insurance sector has been growing rapidly in China.

Based on above factors, there are some issues in the market as well:

1. Since many new insurance companies and brokerage firms have been established within the same short period, poaching has become very serious.
2. Looking for short-term success, do not have a vision for long-term success and build as a life-time career.
3. Most advisors cannot concentrate on life insurance only, but often multi-tasking with other business opportunities.
4. Short-term profit driven, which causes low reputation to their clients.
5. More restricted rules and regulations have been released in the market.
6. MDRT is currently under its registration process in China, some insurance companies have postponed their internal promotion.

MEMBERSHIP COMMUNICATIONS DIVISION 2
ZONE 2 –CHINA SUMMARY (SOUTH)

Suggestions:

1. Build networking platform: Select high influence and engaged MDRT members to join MCC, and serve members and potential members in their company.
2. Professionalism is the key: leverage on mentoring program and local activities to share and inherit value of MDRT.
3. Due to the vast size, China has divided into North and South region in this year. If we can integrate the resources, use advanced technologies, social circles, to disseminate positive messages among advisors, the substantial results will naturally follow.
4. Popular fashion: many creative marketing platform, such as “Dou Yin” has been well received in China. If possible, MCC Chairs can recommend and select creative members to make videos about true stories of insurance claims and why insurance is important, then post the videos online to promote the mission of life insurance agents.
5. MDRT roadshows: to be up front and close with advisors, unselfishly share and promote MDRT’s Whole Person concept and its true values.
6. International integration: MDRT President, headquarters and MCCs to visit industry organizations and insurance companies. We can also deploy Ambassadors to share other countries/territories insurance selling best practices, double up the positive result.

GLOBAL COUNCIL MEMBER COMMENTS:

The growth in membership in China is amazing. That also means that more attention is required to maintaining the size of the membership. As China is geographically quite sprawling, using technology to manage the organization will be important, but just as important, if not more, is to create offline gatherings of members.

Being part of MDRT is an honor, but the organization is a school where members strive to maintain and grow MDRT. Therefore, I believe you should set up teams by company and train more leaders. Of course, leaders in the early stage of an organization’s development have to bear the burden of dedication and sacrifice. Even though China is currently divided into North and South, I think you will need more sub-divisions of the region. Members generally love sharing their sales ideas to boost productivity. I think using the MDRT resources would be a good way to do that. It’s also crucial that when you do use those resources, the concept of Whole Person is shared.

China is a region where we can expect significant growth and I look forward to having more active exchanges and communication with China.

MCC Business Plan Reporting Template

Country: Hong Kong and Macau

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 Day 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):	Through Main Platform and Focus Session programs, to improve production and Whole Person experience for members and non-members
*MDRT STRATEGIC PLATFORM SUPPORTED (Identify platform(s):	<input checked="" type="checkbox"/> CELEBRATING ACHIEVEMENT <input type="checkbox"/> GUIDED DEVELOPMENT <input type="checkbox"/> STRONGER TOGETHER <input checked="" type="checkbox"/> TRANSFORMATIVE PRODUCTIVITY
*SCHEDULED DATE(s): When will the activity occur	Wednesday, April 29, 2020

<p>*IMPLEMENTATION/TIMELINE (Outline the process/steps planned, timeline and personnel (staff, vender and member volunteer) resources required)</p>	<p>Partner with LUA Hong Kong. As soon as a contract is signed for this event, we are going to start preparation. First phase of event organizing should be done by the end of 2019.</p> <p>In the beginning of 2020, to start ticket selling and second phase of event organizing, as well as to recruit PGAs.</p>
<p>*PRIMARY TARGET MARKET/AUDIENCE (member/non-member, specific demographics such as region, age, membership years, membership type, etc.):</p>	<p>Members from Hong Kong 50% of members, majority of them are 1-5 year members 50% of non-members</p>
<p>SECONDARY TARGET MARKET/AUDIENCE:</p>	<p>Other members in the region</p>

<p>*GOAL & SUCCESS MEASUREMENTS (identify specific, quantitative, measurable success goals):</p>	<p>Successfully on registration sale, and ideally to have participants from all insurance companies</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>Provide speakers and Executive Committee members to attend</p>

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

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MCC Business Plan Reporting Template

Country: _____ Hong Kong and Macau _____

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:	Member Gathering
*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):	Social networking event in the beginning of 2020
*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"/> TRANSFORMATIVE PRODUCTIVITY
*SCHEDULED DATE(s): When will the activity occur	Jan-20
*IMPLEMENTATION/TIMELINE (Outline the process/steps planned, timeline and personnel (staff, vender and member volunteer) resources required)	MCC will start making arrangements in December 2019

<p>*PRIMARY TARGET MARKET/AUDIENCE (member/non-member, specific demographics such as region, age, membership years, membership type, etc.):</p>	<p>Approximately 100 current members</p>
<p>SECONDARY TARGET MARKET/AUDIENCE:</p>	<p>N/A</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>To set higher goals in their career, and encourage fellow advisors to become MDRT member</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>Funding to cover the cost of this event</p>

WHAT SUPPORT DO YOU NEED FROM MDRT:	MDRT representatives in the region
*List alternate approaches that were considered and reasons for choosing proposed activity.	

MEMBERSHIP COMMUNICATIONS DIVISION 2
ZONE 3 – HONG KONG/MACAU SUMMARY

OBJECTIVE:

Actively promote MDRT membership to current and potential members worldwide. Monitor industry activities and involvement worldwide. 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:	Sung Man Park, Seoul, Republic of Korea
Region Chair:	Eunice Chen, Taipei, Taiwan
Zone Chair:	Wu Shuk Ping Joyce, Hong Kong, Hong Kong
Staff Liaison:	Jennifer Chen

ZONE 3 CHAIR

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

In 2019-20 organizational year, the biggest challenge is the business recession triggered by political instability. This is a barrier to further develop MDRT's membership growth.

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

Although political instability and business recession are out of our control, we can still encourage and provide support to members. We hope to receive great support from each above party for our future local activities.

Additional Comments:

Due to current situation, it will affect those policies brought by Mainland China clients in Hong Kong. Yes, we can take this opportunity to put emphasis on promoting Whole Person concept, increase advisors' own value and create greater membership engagement from current members.

Member Recognition:

Benjamin Tam: he has been able to demonstrate his leadership when handling unforeseen situations at last year's MDRT Day. He is the lead person for organizing the next MDRT Day in 2020. During negotiation with LUA Hong Kong, he's been coordinating with them, yet making sure that MDRT's best interests are protected at the same time;

Ben Un: He trains and grows MCC Chairs in Macau, and coordinates all MCC related activities in the area;

Garry Chan: during PGA gathering, he has arranged fun activities to encourage members being more involved with the organization, and to promote the true values of MDRT;

REGION CHAIR COMMENTS:

Currently, Hong Kong and Macau are under the same zone and overseen by one chair. Since there are many differences between the two areas, is this causing any difficulty for the chair to manage them effectively? If possible, an integration for this zone might be helpful to improve the situation! My observations are as follows:

1. Hong Kong and Macau have regional differences, such as operational models, business practices between advisors, etc.
2. Recent political issue has ripple effects on economy and public safety.

MEMBERSHIP COMMUNICATIONS DIVISION 2
ZONE 3 – HONG KONG/MACAU SUMMARY

3. In the last few years, many advisors' production has depended on business from Mainland China.

Some suggestions for Hong Kong and Macau are:

1. Build a stronger MCC team in Hong Kong and Macau, maintain good communications with senior officials of insurance companies;
2. Senior leaders of MDRT Headquarters conduct visits to financial regulatory entities, to start building relationships and mutual understanding of each organization;
3. Focus on mentoring program, adapt and share with other fellow members;
4. Consider to select highly respected members to join MCC, leverage their influence to improve membership retention and growth;

GLOBAL COUNCIL MEMBER COMMENTS:

I would like to first thank Zone Chair Joyce, of Hong Kong, for her hard work. I find it regrettable that the business of our members is being affected by the political issues. I believe it is crucial, as Region Chair Eunice Chen mentioned, to bolster MCC by company and region and develop competent leaders. I think you also need to carefully consider how to effectively maintain the membership that suddenly increased as of recently; for example, you may want to consider planning an event for first-timers or conducting mentoring sessions between life time members and those who are in their first and second year of membership, all designed to promote communication and exchange among members. Japan has well-established meetings by region while Korea has frequent meetings by company. Korea also holds a monthly meeting for leaders to strengthen the bond among members and organically train the next leaders. I would recommend that you also hold regular meetings for members in leadership positions. I believe that this will serve as a platform where the next leaders are invited to form a strong sense of bond.

MCC Business Plan Reporting Template

Country: Hong Kong and Macau

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).

*ACTIVITY:	<u>1st REPORT due 30 September, 2020</u>
	MDRT Day 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):	Through Main Platform and Focus Session programs, to improve production and Whole Person experience for members and non-members
*MDRT STRATEGIC PLATFORM SUPPORTED (Identify platform(s):	<input checked="" type="checkbox"/> CELEBRATING ACHIEVEMENT <input type="checkbox"/> GUIDED DEVELOPMENT <input type="checkbox"/> STRONGER TOGETHER <input checked="" type="checkbox"/> TRANSFORMATIVE PRODUCTIVITY
*SCHEDULED DATE(s): When will the activity occur	Wednesday, April 29, 2020

<p>*IMPLEMENTATION/TIMELINE (Outline the process/steps planned, timeline and personnel (staff, vender and member volunteer) resources required)</p>	<p>Partner with LUA Hong Kong. As soon as a contract is signed for this event, we are going to start preparation. First phase of event organizing should be done by the end of 2019.</p> <p>In the beginning of 2020, to start ticket selling and second phase of event organizing, as well as to recruit PGAs.</p>
<p>*PRIMARY TARGET MARKET/AUDIENCE (member/non-member, specific demographics such as region, age, membership years, membership type, etc.):</p>	<p>Members from Hong Kong 50% of members, majority of them are 1-5 year members 50% of non-members</p>
<p>SECONDARY TARGET MARKET/AUDIENCE:</p>	<p>Other members in the region</p>

<p>*GOAL & SUCCESS MEASUREMENTS (identify specific, quantitative, measurable success goals):</p>	<p>Successfully on registration sale, and ideally to have participants from all insurance companies</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>Provide speakers and Executive Committee members to attend</p>

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

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MCC Business Plan Reporting Template

Country: _____ Hong Kong and Macau _____

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:	Member Gathering
*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):	Social networking event in the beginning of 2020
*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"/> TRANSFORMATIVE PRODUCTIVITY
*SCHEDULED DATE(s): When will the activity occur	Jan-20
*IMPLEMENTATION/TIMELINE (Outline the process/steps planned, timeline and personnel (staff, vender and member volunteer) resources required)	MCC will start making arrangements in December 2019

<p>*PRIMARY TARGET MARKET/AUDIENCE (member/non-member, specific demographics such as region, age, membership years, membership type, etc.):</p>	<p>Approximately 100 current members</p>
<p>SECONDARY TARGET MARKET/AUDIENCE:</p>	<p>N/A</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>To set higher goals in their career, and encourage fellow advisors to become MDRT member</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>Funding to cover the cost of this event</p>

WHAT SUPPORT DO YOU NEED FROM MDRT:	MDRT representatives in the region
*List alternate approaches that were considered and reasons for choosing proposed activity.	

MEMBERSHIP COMMUNICATIONS DIVISION 2
ZONE 7 –TAIWAN SUMMARY

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:	Sung Man Park, Seoul, Republic of Korea
Region Chair:	Eunice Chen, Taipei, Taiwan
Zone Chair:	Benson Ni, Taipei City, Taiwan
Staff Liaison:	Jennifer Chen

ZONE 7 CHAIR

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

Wish to expand MDRT Day's capacity to 2,000 in 2021, which is three times larger than this year's MDRT Day registration number. Speaker and venue selection are the biggest challenges of preparing such a large event.

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

1. Suggest competent speakers for the event.
2. Arrange MDRT President to visit insurance companies.

Additional Comments:

The capacity for MDRT Day has been around 600-750 attendees. In order to have more members and advisors to attend local MDRT events, experience the Taste of MDRT Annual Meeting and know more about MDRT's Whole Person concept, we plan to expand the MDRT Day in April 2021. This requires more MCC and volunteers to support. We also need more company visits to promote local events to major insurance companies who are not yet connected with us. This will help life insurance advisors in Taiwan know more about MDRT and create more engaging opportunity.

Member Recognition:

Szu-hua Sandy Chen: Sandy has been with MCC for three years. During the years, she has led several sub-committees within the Taiwan Chapter, including volunteering committee, promotion committee, currently in charge of event organizing committee. Sandy is a devoted member volunteer, pays attention to great details and we can always count on for any tasks assigned to her.

Yin-Miao Chen: Yin-Miao has been with MCC for many years in charge of finance and event registration, as well as secretary of Taiwan Chapter. She plays a key role of coordinating communications and cooperation among the team.

REGION CHAIR COMMENTS:

In the recent years, advisors in Taiwan have been facing following key issues:

1. Highly educated/elite population has been immigrating to other countries.
2. Aging population.

MEMBERSHIP COMMUNICATIONS DIVISION 2
ZONE 7 –TAIWAN SUMMARY

3. Low birth rate.
4. Political tension between Taiwan and Mainland China.
5. Average income is low.
6. More restricted regulation.
7. Overseas insurance policy has been introduced into Taiwan.
8. Saving type policy becomes very popular.
9. Low retention rate.

Therefore, in order to improve retention rate on current members and encourage new advisors to join MDRT, we can consider following options:

1. Focus on the importance of protection products, advocate it through all possible channels.
2. MDRT senior officials visit companies to have face-to-face discussions.
3. Zone chair together with company chairs from top five insurance companies must visit company officials and staff to have two-way communications.
4. Consider to have roadshows in north, middle and south Taiwan which can be organized by MCC chairs who live in the respective areas. Those road shows can make connections with local members to improve membership experience.
5. Select and post sales ideas, power phase and translated content on Taiwan Chapter's website.
6. Utilize mentoring program, 1+1 definitely greater than 2.

GLOBAL COUNCIL MEMBER COMMENTS:

I would like to thank Zone 7 Chair Benson Ni for his dedication and commitment to action. In order to scale up the 2021 MDRT Day and secure volunteers for the event, you should make sure that members and non-members participate in the 2019 and 2020 event through excellence, integrity and leadership based on the Whole Person concept. Mentoring is recommended and promotional efforts should be made through regional meetings.

For those who are not familiar with MDRT, sales ideas should be shared with them so that you can contribute to increasing their productivity.

MDRT is a voluntary organization, and as such, participation should be voluntary. Of course, that will require great dedication and hard work from the zone chair and leaders from various regions. In addition, I also believe that setting up a stable succession pipeline of leadership through training next leaders and systemizing the organization is necessary.

MCC Business Plan Reporting Template

Country: Taiwan

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).

*ACTIVITY:	<u>1st REPORT due 30 September, 2020</u>
	MDRT Member Only Seminar
*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):	In order to be well prepared for the ever changing life insurance industry, we have invited Bernard Lim from Singapore for a full day training session. Event theme is "How to Become aTrustworth Advisor". Projected number of attendees is 650.
*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"/> TRANSFORMATIVE PRODUCTIVITY
*SCHEDULED DATE(s): When will the activity occur	Tuesday, October 8, 2019

<p>*IMPLEMENTATION/TIMELINE (Outline the process/steps planned, timeline and personnel (staff, vender and member volunteer) resources required)</p>	<p>9 September: complete proofreading for program book, registration form for next year's event, and registration information for this event; 16 September: event team meeting; 23 September: continue to approve marketing materials for the event; 2 October: finalize onsite volunteer assignments, confirm PPT from the speaker; 7 October: rehearsal, onsite preparation;</p>
<p>*PRIMARY TARGET MARKET/AUDIENCE (member/non-member, specific demographics such as region, age, membership years, membership type, etc.):</p>	<p>500 Current members and 150 mentoring program participants; Participants: 70% from Taipei, 30% from other areas</p>
<p>SECONDARY TARGET MARKET/AUDIENCE:</p>	<p>None</p>

<p>*GOAL & SUCCESS MEASUREMENTS (identify specific, quantitative, measurable success goals):</p>	<p>1. Actual number of attendees is about 600 2. Survey shows that 90% of attendees have rated event as "satisfying"</p>
<p>*NEEDS ANALYSIS (Please share quantifiable data that supports the request)</p>	<p>None</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.**

Originally we thought to open for members only, and host at a hotel with lunch provided. Due to budgeting concerns, we decided to arrange as is in order to break even on the overall cost.

MEMBERSHIP COMMUNICATIONS DIVISION 2
ZONE 5 - JAPAN

OBJECTIVE:

Actively promote MDRT membership to current and potential members worldwide. Monitor industry activities and involvement worldwide. 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:	Sung Man Park, Seoul, Republic of Korea
Region Chair:	Yuji Uchikawa, AFP, Tokyo, Japan
Zone Chair:	Shuhei Ino, Tokyo Japan
Staff Liaison:	Yuna Kim

ZONE 5 CHAIR

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

In recent years, the number of members in Japan has increased steeply. However, the outlook for the next year is not bright due to new regulations in Japan. Therefore, we would like to improve the quality of members as well as retaining the number of members. In this organizational year, we will raise awareness among members that they are part of a prestigious international organization.

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

Please consider the followings: Dispatch MDRT ambassador(s), continue holding workshops, and provide information exchange and relationship-building opportunities for zone chairs.

Additional Comments: None

Member Recognition:

Hikomichi Chiba, the Vice Chair of the Japan Chapter. He has been active at the heart of many events this year. He is also the Focus Session Captain of AM PDC.

Kei Yamasaki, the Second Vice Chair of the Japan Chapter. I recognize him for the same reason as above. He also serves as the MDRT Foundation Liaison.

Yasuhisa Kojima, Secretary of the Japan Chapter. For the same reason as above. The meetings are held more frequent than ever, thanks to him.

REGION CHAIR COMMENTS:

MDRT is an organization with a long history, based on a noble philosophy and a high code of ethics. The significance of MDRT and the messages issued by MDRT have a great impact on the insurance industry. The challenge is who is sending messages to members, non-members, insurance companies and industry

MEMBERSHIP COMMUNICATIONS DIVISION 2
ZONE 5 - JAPAN

associations? In what situations those messages are sent? What means? I think this is an eternal challenge for MDRT.

Even if we have a noble philosophy and implement great activities, if the information is not communicated correctly, it will stay at our self-satisfaction level unfortunately. In Japan, the awareness of MDRT is increasing year by year, making it easier for us to work. I think technology gives us the opportunity to get in touch with people who have been difficult to approach.

I believe if we use various methods and implement activities based on the MDRT philosophy, MDRT can increase the social impact on the life insurance industry in Japan. In that sense, our responsibility is heavy and I think we should focus our efforts on improving the quality of our members.

Here is additional information concerning MDRT Day Japan. In terms of the success measurement of MDRT DAY (50th anniversary), we are inviting U.S. board members, board members from the Korea Chapter and leaders from each country in Division 2.

We don't have many opportunities to recognize that we are part of an international organization when you work and live in Japan. However, this year, we will appeal to Japanese members that they are part of a global organization.

GLOBAL COUNCIL MEMBER COMMENTS:

I believe the history of Zone 5 that spans 50 years is attributed to the success in delivering, maintaining, and advancing the values of MDRT for a long time and the subsequent result of continuous growth of the number of members in recent years. Such success would not have been possible without the dedication and leadership of the previous presidents of Japan MDRT and the current members of the Executive Committee.

As the zone chair mentioned, the number of members will only increase when you focus on maintaining the number of members throughout the year and thoroughly prepare the 50 year anniversary event to ensure that each and every member of Zone 5 members have a sense of pride and belonging from being part of a global, world-class organization such as MDRT.

I'd also recommend that region chairs take the lead in sharing the concept, program, and lecture content of each country's MDRT Day event as well as what was done well and what needed improvement in the event to ensure information exchange among zone chairs.

As per the method of delivering MDRT values, I'd suggest utilizing social media, leveraging on the advanced technology. The content uploaded on social media (schedule of MDRT, lectures, and regional workshops and etc.) will be provided by the Secretariat of the Zone to encourage the members to share and deliver the right values of MDRT and guide members to lead the life of whole person.

I wish you all the best for the 2020 MDRT Day and hope it will be a great success.

MCC Business Plan Reporting Template

Country: Japan

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).

<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):	
*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	MDRT Day April 15-17, 2020

<p>*IMPLEMENTATION/TIMELINE (Outline the process/steps planned, timeline and personnel (staff, vender and member volunteer) resources required)</p>	<p>MDRT Day: It has been two years since the 50th anniversary project has been prepared, and we will hold a meeting several times this year for the event. The program development committee plans it. In addition, the contractor will help organize it. However, the Japan Chapter and its secretariat take the initiatives in it.</p>
<p>*PRIMARY TARGET MARKET/AUDIENCE (member/non-member, specific demographics such as region, age, membership years, membership type, etc.):</p>	<p>MDRT Day: The event is usually for members only; however, we welcome the participation of members, non-members who aim to become members, and employees working in the non-sales department of insurance companies. The main purpose is to retain members and for public relations within insurance companies.</p>
<p>SECONDARY TARGET MARKET/AUDIENCE:</p>	

<p>*GOAL & SUCCESS MEASUREMENTS (identify specific, quantitative, measurable success goals):</p>	<p>MDRT DAY: We expect a total of 6,000 participants; 3,000 members and 3,000 non-members. I think it is possible to measure how much people are interested in MDRT and how serious they are to become members by the number of non-member participants.</p>
<p>*NEEDS ANALYSIS (Please share quantifiable data that supports the request)</p>	<p>Usually, a half of all MDRT members attend MDRT Day in Japan.</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 would like to receive MDRT ambassador(s) on MDRT Day in Japan to raise awareness among Japanese members as part of an international organization.</p> <p>We also would like to ask MDRT to hold a workshop after next year.</p> <p>We also need support as we need to strengthen our way of approaching to insurance agencies.</p>

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

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MCC Business Plan Reporting Template

Country: Japan

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 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:	Activities by each block
*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):	
*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	July, 2019-January, 2020 at any time

<p>*IMPLEMENTATION/TIMELINE (Outline the process/steps planned, timeline and personnel (staff, vender and member volunteer) resources required)</p>	<p>Block activities: There are 14 blocks in Japan, where workshops and volunteer activities are organized. Activity plans are considered and endorsed by the Chapter board. We don't use contractors for these activities.</p>
<p>*PRIMARY TARGET MARKET/AUDIENCE (member/non-member, specific demographics such as region, age, membership years, membership type, etc.):</p>	<p>Block activities: There are varieties of activities in the 14 blocks. Typically, they hold workshops 1-3 times a year and volunteer activities at any time. Many blocks aim to increase members and encourage the participation of those who want to become members. Members can participate in workshops in any blocks, and they can get notifications about those events and access to the on-line registration page on the Japan Chapter's website. More members participate in events outside of their block recent years.</p>
<p>SECONDARY TARGET MARKET/AUDIENCE:</p>	

<p>*GOAL & SUCCESS MEASUREMENTS (identify specific, quantitative, measurable success goals):</p>	<p>Many participants want to become members, so if the number of MDRT members in Japan in the next fiscal year is unchanged, the activity is considered successful.</p> <p>The reason: Since this year, Japan's Financial Services Agency placed the new regulations, so the number of MDRT member in Japan is likely to decrease.</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>	

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

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MCC Business Plan Reporting Template

Country: Zone 5 Japan

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 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 Charity Marathon
*Pillar (Identify the pillar that this activity supports)	<input type="radio"/> GROWTH <input type="radio"/> RETENTION <input type="radio"/> ENGAGEMENT
*DESCRIPTION (Provide a brief description of activity planned):	
*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	The Charity Marathon: February 9, 2020

<p>*IMPLEMENTATION/TIMELINE (Outline the process/steps planned, timeline and personnel (staff, vender and member volunteer) resources required)</p>	<p>Charity Marathon: We organized a marathon race as one of the 50th anniversary events for charity and external publicity purposes. We will use a registration system of a well-known event company since we accept the participation of general public.</p>
<p>*PRIMARY TARGET MARKET/AUDIENCE (member/non-member, specific demographics such as region, age, membership years, membership type, etc.):</p>	<p>The charity marathon event where members , non-members who want to become members and their families can participate. Since we organize it for MDRT's publicity, all participants and staffs will wear T-shirts with MDRT log on it. Because the marathon takes place in Kobe, it is considered that most of the participants will be coming from Kansai region (the area around Kobe, the western region in Japan).</p>
<p>SECONDARY TARGET MARKET/AUDIENCE:</p>	

<p>*GOAL & SUCCESS MEASUREMENTS (identify specific, quantitative, measurable success goals):</p>	<p>The charity marathon is expected to involve 1,500 people, including the general public.</p>
<p>*NEEDS ANALYSIS (Please share quantifiable data that supports the request)</p>	
<p>*BUDGET:</p>	<p>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>	

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

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MEMBERSHIP COMMUNICATIONS DIVISION 2
ZONE 6 –KOREA SUMMARY

OBJECTIVE:

Actively promote MDRT membership to current and potential members worldwide. Monitor industry activities and involvement worldwide. 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:	Sung Man Park, Seoul, Republic of Korea
Region Chair:	Yuji Uchikawa, AFP, Tokyo, Japan
Zone Chair:	Shuhei Ino, Tokyo Japan
Staff Liaison:	Yuna Kim

ZONE 6 CHAIR

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

1. Reduced percentage of new agents reaching MDRT. The market is more saturated compared to the past and the competence of new agents is weaker (in terms of the pool of prospects, younger age, and lack of working experience). This results in many challenges in new agents reaching MDRT.
2. A growing number of agents are shifting from the insurers to General Agents (GAs). While insurance companies (captive channel) have an established MDRT culture supported by mentoring programs and a strong operating organizational structure, GAs fall short of insurance companies in terms of MDRT culture and organizational structure. More promotional efforts and support should be given to GAs.

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

1. Support for engaging lecturers and speakers; support for hiring famous/reputable lecturers and speakers for Korean events (e.g. MDRT Day, Special Session, and etc.)
2. This will result in promoting MDRT to GAs and induce new membership. Provision of stories of successful agents in countries where GA is more established and engaging effective lecturers and speakers will be helpful.

Additional Comments

MDRT Korea is planning to conduct the following initiative and continue with the efforts in order to expand and retain the MDRT membership during 2019~2020.

GA Promotion of MDRT to GAs and securing new membership

1. Top-down and bottom-up promotion: MDRT will be promoted at the business level by contacting the CEO and executives of GAs. At the same time, influential agents within GAs will be contacted to promote the MDRT culture and support them in creating their own study groups or gatherings.
2. Lectures to promote MDRT values: Regular lectures by instructors provided by MDRT Korea to share the values of insurance and sales ideas to GAs that lack system.

MEMBERSHIP COMMUNICATIONS DIVISION 2
ZONE 6 –KOREA SUMMARY

3. Workshops for GA: Insurers and GAs have different ways of doing sales. Workshops to be conducted for members and mentees working for GAs (first workshop to be conducted on October 22, 2019)
4. Events centered around members
 - a. Before 2019, non-members were allowed to participate in many events with the intention of encouraging the mentees and promoting MDRT in Korea (including Korea MDRT Day). In 2019, Special Session was conducted only for the MDRT members for the first time. Korea MDRT Day in 2020 will be only for members.
5. Development of resources
 - a. “Resource Committee” was newly established in 2019 with the aim to provide good lectures and share great sales ideas with the members (former training committee was reshuffled)
 - i. Lecturers and speakers are discovered to provide knowledge in the insurance industry or motivate members to recommend the right lecturer/speaker for an event. The list of speakers is regularly updated so that the list is maintained up-to-date with speakers who are in line with the latest trends.
 - ii. Publication of a sales idea book
 - b. A booklet containing sales ideas collected and compiled over the last few years will be published and distributed to members (to be distributed by the end of 2019 or early 2020)
6. Operation of small study group sessions
 - a. A small study group (50~70 people) session is carried out to encourage sharing of more practical sales ideas. Two sessions were conducted in June and August 2019 with one more session in November. Lectures from Annual Meetings and Global Conferences are introduced to share more sales and marketing ideas. More groups will be carried out in 2020 in and outside Seoul to maintain balance between the two regions.
7. Promotion outside Seoul
 - a. There are a total of 4 regions outside Seoul: the Central, Honam (Southwestern) region, Daegu-Kyungbuk (Southeastern) region, and Busan-Youngnam (Southern) region. Regions with a relatively low number of members have not been activated. Additional measures to promote MDRT apart from the regional seminars will be created.

Member Recognition: Recognize members whose contributions exceeded expectations. Provide examples.

1. Kim Guk Jeong, Area Chair and Deputy Chairperson of Korea Chapter 1
He actively engages in supporting each division and committee activities. He also provides advice for critical decision-making based on his ample experience. He successfully carried out his responsibilities as the advisor to Korea MDRT Day event. In addition, he contributed to successful communication with the Executive Committee as the liaison of the Company Committee, consisting of members from different insurers. He has set an example with his excellent business activities and engagement as the member of the Operating Committee.

MEMBERSHIP COMMUNICATIONS DIVISION 2
ZONE 6 –KOREA SUMMARY

2. Kim In Kyo, Area Chair and Deputy Chairperson of Korea Chapter 2
He has played a major role in the Annual Meeting and other international events. He also contributed as the liaison for the Regional Committee. He successfully completed his tasks as the advisor to the Special Session.

3. Kim Kyung Ryung, Area Chair and Secretary to Korea Chapter
He diligently carries out his responsibilities as the secretary to Korea Chapter. He has shown excellent leadership in leading the staff members of the secretariat so that each committee can complete its tasks successfully. He has carried out weekly meetings with the staff of the secretariat and played a leading role in executing the decisions of the Executive Committee.

4. Park Hyun Pio, Chair of the PDC Committee
PDC Committee was newly launched with the organizational reshuffling and he took on the position of the PDC Chair. He planned and executed the Special Session in April and MDRT Day in September. He especially took the communication with the Executive Committee very seriously to better understand the overarching direction of MDRT and its plans to successfully execute his tasks. He was very thorough in organizing the events, which resulted in the success of both of the events.

Identify the top three candidates to be considered as your successor.

- 1st. Kim Guk Jeong, Deputy Chairperson of Korea Chapter 1
- 2nd. Kim In Kyo, Deputy Chairperson of Korea Chapter 2
- 3rd. Kim Kyung Ryung, Secretary to Korea Chapter

REGION CHAIR COMMENTS:

MDRT Korea actively prepares and implements some activities including large and small meetings. We can see that the Korea Chapter plays an important role in MDRT. I would like to express my sincere respect for the willingness and effort of Korean board members and the Chapter.

As pointed out as an issue in the report, the number of GAs is rapidly increasing in Korea, and it makes this difficult to communicate MDRT culture and information with them. The same problem has occurred in Japan as well. With captive channels, insurance companies can collaborate with us, and both the U.S. HQ and the Korea Chapter can communicate messages quickly. But that doesn't necessarily mean they can do them appropriately. Depending on the information transmission means and who conveys what message in which occasion, the impression, received by the information recipients, will be different.

Zone 6 uses the Ambassador program at workshops and meetings and invites successful GA speakers to increase their participation. I hope their objectives will be accomplished.

2020 MDRT Day Korea is a member-only event. I believe this is how it should be. We should hold MDRT Days for members' benefits. If you become an MDRT member, you will be able to participate in many meetings and use MDRT contents. We must motivate non-members with these membership benefits.

Lastly, MDRT is an organization that asks members to make effort to become a "Whole Person." So, we must always act on Whole Person concept. I hope that members who agree with this concept will continue coming together toward the future.

MEMBERSHIP COMMUNICATIONS DIVISION 2
ZONE 6 –KOREA SUMMARY

GLOBAL COUNCIL MEMBER COMMENTS:

I'd like to first pay my respect to Zone 6 for its systematic and creative activities.

I commend your decision to plan the MDRT Day in 2020 as a members-only event.

It might involve temporary financial difficulties, but I do think that it'll serve as an opportunity for growth.

As per the growing number of GAs and its agents in Zone 6, it seems that it's an inevitable trend that we cannot reverse. What we have to do is to focus on what we can do. Therefore, I think it's time for us to think about how to deliver the values of MDRT to members and non-members working for GAs.

First of all, I think we need to differentiate GAs focusing on life insurance from GAs focusing on P&C insurance considering the nature of GA business.

Then we'll have to utilize GA TFT to visit or invite prospect member GAs to deliver MDRT values. I think I'd recommend that, over time, you slowly encourage and suggest their participation.

I have some suggestions I'd like to make:

You may want to consider dividing the events of Zone 6 based on their characteristics—for example, MDRT Day is for members only while events like Special Session allow both members and non-members to participate in, which will be a slightly revised version of Korea MDRT Experience (since the MDRT Experience hosted by HQ no longer exists).

You may also want to publish a book on sales ideas and as you're doing a wonderful job with the small-scale workshops and regional workshops, you may want to actively promote how great these workshops are.

To add one more suggestion from my experience with the recent Korea MDRT event, after an MDRT Day event is finished in a country, we may want to share the concept, program, and themes of the lectures of that MDRT Day event with other countries as well as what went well and what needed improvement so that countries that are preparing for an MDRT event or countries that haven't had a chance to hold the event can be encouraged and inspired.

I'd like to thank you in advance for your efforts and dedication in the coming year for increasing the size of membership and retaining the members.

MCC Business Plan Reporting Template

Country: Zone 6 Korea

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

	1st REPORT due 30 September, 2020
*ACTIVITY:	Promoting MDRT to companies with a low number of MDRT members (GA and other insurers)
*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):	<p>MDRT Korea's membership mostly consists of members who work for insurers. 90% of the members of MDRT Korea are those who work for insurers. Meanwhile, members who work for GAs remain under 10%. In Korea, the number of agents working for GAs is continuously increasing and it already surpassed that of captive agents. We plan to promote MDRT to GAs in two primary ways.</p> <p><input checked="" type="checkbox"/> Top Down method. MDRT will be promoted at the business level by contacting the CEO and executives of GAs. Also, we also plan to provide lecturers from MDRT Korea to GAs with no established MDRT culture to conduct training sessions.</p> <p>2. Bottom Up method. Influential agents working for GAs who are interested in MDRT will be contacted so that they can encourage others to create groups/gatherings.</p> <p>3. Seminars for GAs and other insurers (one in 2019 and two in 2020 planned)</p>
*MDRT STRATEGIC PLATFORM	<input checked="" type="checkbox"/> CELEBRATING ACHIEVEMENT <input type="checkbox"/> GUIDED DEVELOPMENT

SUPPORTED (Identify platform(s):	<input type="checkbox"/> STRONGER TOGETHER <input type="checkbox"/> TRANSFORMATIVE PRODUCTIVITY
* SCHEDULED DATE(s) : When will the activity occur	<p>1. KB Finance Service . Training on MDRT culture & sales for their agents planned in Oct.~Nov. 2019. Training will be shared by the Executive Committee of MDRT Korea.</p> <p>2. Rich and Co. 2019년 이내 Sources suggest that the CEO has great interest in MDRT. Executive Committee of MDRT Korea is planning to have a meeting with the executives of the company.</p> <p>3. Seminar for members working for GAs and mentees planned for Oct. 22. (1 day) Planned size of the audience is 100, leadership-level members among those who show greater interest will be targeted so that they can create groups within their organizations.</p>
* IMPLEMENTATION/TIMELINE (Outline the process/steps planned, timeline and personnel (staff, venter and member volunteer) resources required)	<p>MDRT Korea has GA TFT, and the immediate former president is the leader of the TFT. The Executive Committee and relevant staff will support the implementation</p> <p>Visiting the executives of companies will be led by the Executive Committee and request for support will be made when needed to the former Presidents' group.</p>
* PRIMARY TARGET MARKET/AUDIENCE (member/non-member, specific demographics such as region, age, membership years, membership type, etc.):	<p>1. The number of members in GAs is low. However, there are many agents who can qualify for MDRT. Promoting MDRT to as many agents as possible whether they're members/non-members is more important.</p> <p>2. Focus will be on Seoul rather than non-Seoul regions. (25% of Korea's population reside in Seoul and a lot of insurers' offices are concentrated in Seoul.)</p>
SECONDARY TARGET MARKET/AUDIENCE:	
* GOAL & SUCCESS MEASUREMENTS (identify specific, quantitative, measurable success goals):	<p>1. Research on Korea's GAs is needed. Understanding on the number of GAs, their sizes and operating methods is necessary.</p> <p>2. As of 2019, the number of members working for 'GAs and other insurers' stands at 300. The goal is 450 in 2020, which is a 50% increase, and 700 in 2021.</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>1. Cost for rental of seminar venue for study sessions for GA agents (1000 USD*2 times)</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>1. Provision of speakers for bigger seminars in the future</p> <p>The growth of membership in Korea has been in proportion to the number of agents who qualify in large-scale insurers. However, the number of agents who qualify for MDRT is decreasing with the prospect of growth being limited. It's a crucial time for increasing membership from agents working for "GAs and</p>

MCC Business Plan Reporting Template

Country: Korea

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:	Korea MDRT DAY(Members Only)
*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):	<p>Planning to have the annual Korea MDRT Day as a members-only event</p> <p>Korea MDRT Day, which began in 2002, was an event for both members and non-members(or mentees). It resulted in promoting MDRT and instilling a sense of purpose in non-members. But it seems that the time has come to have the event as a members-only event in line with its intentions.</p>
*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	Sept. 18~19, 2020

<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. Planning of the event (Executive Committee & PDC). By Dec. 2019 2. Selection of an event company. Feb.~Mar. 2020 3. Finalizing the event program and selection of speakers (PDC & Committee for selection of speakers). Mar. ~ Apr.2020 4. Production and distribution of event posters. May~June 2020 5. Registration for participation. For the whole month of July 2020 <p>PDC is responsible for organizing the event for MDRT Korea.</p>
<p>*PRIMARY TARGET MARKET/AUDIENCE (member/non-member, specific demographics such as region, age, membership years, membership type, etc.):</p>	<ol style="list-style-type: none"> 1. Eligible participants. It's going to be members only. The event in 2020 will focus on having members only rather than the scale of the event. As non-members are not allowed to participate, the total number of participants is expected to decrease. 2. Location : Pyeongchang in Gangwon Province. It's where the Winter Olympic Games was held, and MDRT Korea has never hosted an event in the city.
<p>SECONDARY TARGET MARKET/AUDIENCE:</p>	
<p>*GOAL & SUCCESS MEASUREMENTS (identify specific, quantitative, measurable success goals):</p>	<p>Projected number of participants is 700~800.</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>	<p>Costs will be covered by the participation fees as well as the budget of MDRT Korea.</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>As this is the first members-only event, the program and speakers will be very important. Most competent speakers with great public-speaking abilities are requested.</p> <p>Membership with MDRT should provide differentiated benefits to the members. Members-only event will satisfy such needs of the members.</p>

MCC Business Plan Reporting Template

Country: Korea

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 team will be doing so that we can better support 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:	Korea MDRT Special Session
*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):	Korea MDRT Special Session is considered a gift to those who won the membership to MDRT, providing the members with motivation and sales ideas
*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	April 21, 2020

<p>*IMPLEMENTATION/TIMELINE (Outline the process/steps planned, timeline and personnel (staff, venter and member volunteer) resources required)</p>	<p>1. Planning of the event (Executive Committee & PDC). By Nov. 2019 2. Finalizing the program and selection of speakers (PDC & Committee for selection of speakers). Dec. 2020 4. Production and distribution of event posters. Feb. 2020 5. Registration for participation. Mar. 2020 (For 3 weeks) Preparation/organization of the event is led by PDC, which is the body responsible for organizing events at MDRT Korea.</p>
<p>*PRIMARY TARGET MARKET/AUDIENCE (member/non-member, specific demographics such as region, age, membership years, membership type, etc.):</p> <p>SECONDARY TARGET MARKET/AUDIENCE:</p>	<p>The event was conducted for both members/non-members in 2017~2018, and for members only in 2019. The event is planned for members only for 2020 as well, but discussion on whether to include mentees is still ongoing. The location will be Seoul.</p>
<p>*GOAL & SUCCESS MEASUREMENTS (identify specific, quantitative, measurable success goals):</p>	<p>500~600 people</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>Approximately 20,000 USD Rental of event venue, sound systems, and visual equipment as well as cost for event pamphlets</p>
<p>WHAT SUPPORT DO YOU NEED FROM MDRT:</p>	<p>Lecturers and speakers (speakers who can share sales ideas rather than motivate the audience; speakers who can share effective ideas such as power talk or sales tools are needed)</p>
<p>*List alternate approaches that were considered and reasons for choosing proposed activity.</p>	<p>The event will be a great gift for members who joined the membership at the beginning of the year and will be an appropriate for the needs of the members as MDRT can provide many ideas for improving their sales results.</p>