

**MEMBERSHIP COMMUNICATIONS DIVISION 3**  
**EDGE AND CONTENT TASK FORCE**

**OBJECTIVE:**

Identify content and content experts on topics of interest to U.S. and Canadian members for the 2020 MDRT EDGE as well as the MDRT Resource Zone and other MDRT publications.

**CHAIR SUMMARY:**

Identify Pillar: *Growth, Retention, Engagement*

- a. For the pillar selected, identify the engagement lever(s) and platform(s) will you focus on in your region, zone, and/or country?
  - i. Growth: I believe that through EDGE content and programming we will bring together the top advisors in North America and they will go back to their peers and rave about the difference it will make in their business. I think it will provide growth in membership for people who were not satisfied with the Annual Meeting structure and would like to re-engage in the organization. I also think that through the variety of distribution channels our content will be known as the thought leader in the industry. We will be very focused on delivering relevant content and an amazing experience for our 2020 EDGE meeting.
  - ii. Retention: I think that through the Resource Zone and MDRT EDGE content we can become the one stop resource for our members for their continued growth and development in the years to come. I think that we will retain members as more and more of them decide that EDGE is their MDRT meeting for the year. I also think we will retain members because of the relationships they can continue to foster through their attendance and engagement in the meetings. We will be encouraging them to really explore the Resource Zone, The MDRT Academy, Mentoring and study group resources that MDRT has to offer.
  - iii. Engagement: I think the engagement will be through the member's attendance at the meeting, their peer groups, and the opportunity to participate in the meeting. I think that members will also spread the word about our resources and how they use them in the meeting. The intention would be to make sure to really promote and advertise their content while at the meeting.
- b. What activities are happening or are being planned that support the zone plan for the organizational year?
  - i. We have our meeting scheduled for December 12 and 13 at MDRT headquarters and we will create our activity schedule for the year.
- c. How are you measuring results?
  - i. We will measure results based on the member surveys and attendance at the MDRT EDGE meeting in 2020.
- d. What did you accomplish and what measurable results have been achieved to date?
  - i. We have just finished an extremely successful EDGE 2019 meeting in New York City.
  - ii. All members of the committee have been asked to take notes and record feedback to be shared as we build next year's meeting.

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EDGE AND CONTENT TASK FORCE**

**GLOBAL COUNCIL MEMBER COMMENTS:**

This committee will be meeting December 12 and 13 in Chicago.

We just finished a very successful EDGE meeting in New York City. This was a cutting edge meeting and I think MDRT is on the right path as to developing the Canadian and U.S. markets. As we all know, membership has been down for a number of years to a variety of factors, some of which are the following: People aging and retiring, apathy among younger people etc.. The EDGE had brought a fresh perspective to MDRT in providing what has been a cutting EDGE meeting for members from Canada and the USA. The question is how do we make this better and who do we bring to the meeting that will bring additional new members? Ben and I have had discussions regarding potential speakers like Ed Slott. The Academy and Resource Zone are a huge win for MDRT and we will continue to develop this as we move forward.

More to come at after our meeting in December.

**CHALLENGES TO CONSIDER:**

None at this time

**OPPORTUNITIES TO CONSIDER**

None at this time

**MEMBER RECOGNITION**

None at this time

**PARTICIPANTS**

ExCom Liaison(s):	Ross Vanderwolf, CFP, Fortitude Valley, Queensland, Australia Peggy Tsai, RFP, CCFP, Taipei, Taiwan
Global Council Member:	Marc A. Silverman, CFP, ChFC, Miami, Florida, USA
Chair:	Benjamin Harding, CFP, ChFC, Woburn, Massachusetts, USA
Members:	Frank W. Andreoli, RFC, Markham, Ontario, Canada Nickolas Adam Cassis, BSc, CFP, Dartmouth, Nova Scotia Jonathan Godshall C., MBA, LUTCF, Puebla, Mexico Cindy Louisa Gunawan, Lafayette, Louisiana, USA Sunny Jae Lee, Los Angeles, California, USA Kasey Massatti, Lancaster, Ohio, USA Branden C. Schiralli, CLTC, North Palm Beach, Florida, USA
Staff Liaison(s):	Andrea Boetticher, Matt Pais

**MEMBERSHIP COMMUNICATIONS DIVISION 3  
INDEPENDENT CHANNEL TASK FORCE**

**OBJECTIVE:**

Explore the independent channel to identify opportunities for MDRT within this segment.

**CHAIR SUMMARY:**

MDRT has engaged with Matt Braun and Loyalty Research Center to gather and analyze data on the independent channel. There have been two conference calls with Matt and staff to review an initial report and plan next steps. Ultimately, we reaffirmed that there is a viable market within the independent channel and the key questions that need to be answered are, “Where are these independent agents and how do we get to them?” To help us answer those questions, phase two of the project will include focus groups and calls with individuals in three segments:

- Association Leaders
- Independent Agents within MDRT’s membership (staff has identified a list of prospects)
- BGA/IMO and Broker/Dealer Leaders- Larry Rybka has agreed to participate

Matt Braun and his team developed a questionnaire and are scheduling the calls. A final report from LRC is scheduled to be available in November.

Ted Rusinoff and Travis Manning have been invited to serve on the task force, and Matt Braun to keep an eye out for focus group/interview participants who we might want to engage as committee members in phase three of the project. We’ll have a series of virtual meetings with the committee and, depending on the results, may seek to have an in-person meeting in early 2020.

**GLOBAL COUNCIL MEMBER COMMENTS:**

W.J Rossi and I have had a number of conversations regarding the Independent Channel Task Force. As mentioned, MDRT had engaged Matt Braun to develop a questionnaire and they are currently setting calls to gather information. Loyalty Research Group should have a final report available by November.

If the goal of MDRT is to engage these non MDRT members, (which it is) we really need to identify the needs of the independent channel and see what VALUE we can bring to this group. It will be very interesting to see where and how they receive information given that they are independent. As all of us know, it is difficult at best to make it in our business. An independent advisor has a much more difficult time in surviving. We at MDRT can clearly provide the value needed in order to appeal to this group. We need to first find out what help they might need to become and stay successful.

According to what I have read, there are well over 38,000 independent agents, and this is what the focus of this committee will be. How do we engage these agents, what value can we bring to them and how do we potentially get them to become members of MDRT.

**CHALLENGES TO CONSIDER:**

The independent channel has less life insurance background and feels the MDRT brand is life insurance focused. Although that is not accurate, it is a perception which needs to be overcome.

**MEMBERSHIP COMMUNICATIONS DIVISION 3  
INDEPENDENT CHANNEL TASK FORCE**

**OPPORTUNITIES TO CONSIDER**

There are not many associations or groups catering to this market so it could be a plentiful source of growth with the right messaging.

**PARTICIPANTS**

ExCom Liaison(s):	Randy L. Scritchfield, CFP, LUTCF, Damascus, Maryland, USA Peggy Tsai, RFP, CCFP, Taipei, Taiwan
Global Council Member:	Marc A. Silverman, CFP, ChFC, Miami, Florida, USA
Chair:	William J. Rossi, CFP, ChFC, Gainesville, Florida, USA
Members:	Travis D. Manning, CFP, CLU, Caldonia, Ontario, Canada Ted Rusinoff, Stow, Ohio, USA
Staff Liaison(s):	Jennifer Schimka

**MEMBERSHIP COMMUNICATIONS DIVISION 3  
COMMUNITY LEADERS TASK FORCE - CANADA**

**OBJECTIVE:**

Represent MDRT to promote membership and increase member engagement among peers in the local community.

**CHAIR SUMMARY:**

- I. The plan in Canada is about creating awareness of the value of MDRT membership for those that are not yet members. This is mainly done through speaking opportunities at MGAs (Managing General Agencies) and the few captive companies that remain such as Freedom 55 as well as through large events like having a booth at the Canada Sales Congress.
- II. Offer opportunities for current members to engage with one another through book clubs that can offer advisors that are more remote a way to engage. We are also planning an MDRT Day/Taste of MDRT in Toronto and Vancouver.
- III. Educate past members about what has changed with MDRT in recent years such as the addition of The EDGE meeting. This is through speaking engagements and at the Canada Sales Congress.

**GLOBAL COUNCIL MEMBER COMMENTS:**

As was previously mentioned, Dana has done an outstanding job of moving the Community Leaders Task Force in the right direction along with David. She has really engaged her team across Canada to move community leaders in the right direction.

Please carefully read her comments about CE and qualifying for MDRT. I am aware of the issues with CE at the Annual Meeting, but perhaps we can consider this at the EDGE meeting which in turn might drive additional Canadian members.

**CHALLENGES TO CONSIDER:**

The main challenge we have in Canada is related to how we qualify for MDRT. In 2017, there were some changes to our industry that caused us to earn less commission than in the past, but the work being done for the client is a similar level (for example the insurance premium level would be the same). In the first year you need to qualify on commission and then you can qualify on income. This means that it is harder to qualify in the first year then it is to qualify in future years. This is discouraging new members from looking at joining.

CALU (Conference for Advanced Life Underwriting) is an organization that has a similar caliber of advisor to MDRT. Many are members of both and the organizations are often compared as far as how to join for advisors. CALU goes by income in the first year so some decide just to go with CALU because the qualification criteria are better suited for advisors.

The second challenge is around offering CE (Continuing Education) credits for the EDGE meeting. Members understand the challenge with offering them for the Annual Meeting as there are a lot of countries involved. The EDGE meeting is only two countries. When we attend most meetings in Canada, we get CE credits even if it is a gathering of around 25 advisors. CALU offers CE credits and that is why many advisors attend. The credits are required to keep our licenses and designations. This was feedback we heard a lot at the EDGE meeting and also from advisors that did not attend. CE credits would really increase EDGE attendance and advisors would keep their membership to attend EDGE.

**OPPORTUNITIES TO CONSIDER**

We are doing well with regards to getting speaking opportunities. The traction we have has been built up over a few years now and is really exciting. If we could go out there and say MDRT has changed the way we

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COMMUNITY LEADERS TASK FORCE - CANADA**

qualify and it is now like CALU, on income from the first year, this alone will bring up the membership numbers.

Offering CE credits at the EDGE meeting would encourage past members to rejoin and this would also help with our retention. CALU has great retention, in part, because that is half of many members CE credits for the year. If MDRT could be the other half, that would be huge.

**MEMBER RECOGNITION**

Adrian George has far exceeded expectations. We worked for years to be able to attend and speak about MDRT at an MGA called PPI. When they finally offered us this opportunity it was a lot of events and deadlines to meet with regards to the presentation. Lena sent us a great presentation and was a massive help. We had to edit the presentation for the amount of time we had. I was busy making sure we could get someone in each city and working out what the event would look like. Adrian took the presentation and reduced it to the time we were given and did notes for each speaker. There were four of us doing this and they had to be similar. This would not have gone so well without his hard work.

Chris George did the PPI presentation in Vancouver and was able to open further opportunities for us to speak. The feedback from PPI on the presentation he did was excellent.

Elli Schochet is a real strategic thinker. I am impressed how regularly I hear from him on where we need to go next to get the word about MDRT out there. He has been able to introduce us to the right people at many of the MGAs and I had to tell him we have to pace ourselves as we only have so many people on our team. I am very grateful to have his help and connections.

All three of these team members have well exceeded expectations.

**PARTICIPANTS**

ExCom Liaison(s):	Randy L. Scritchfield, CFP, LUTCF, Damascus, Maryland, USA Peggy Tsai, RFP, CCFP, Taipei, Taiwan
Global Council Member:	Marc A. Silverman, CFP, ChFC, Miami, Florida, USA
Chair:	Dana Mitchell, CFP, CLU (Canada), Toronto, Ontario, Canada
Members:	Daniel C. Barill, Sarnia, Ontario, Canada Brad Brain, CFP, CLU, Fort St. John, British Columbia, Canada Adrian George, CFP, TEP, Calgary, Alberta, Canada Chris George, CFP, TEP, Vancouver, British Columbia, Canada Michael Joseph Haggerty, CPCA, Fredericton, New Brunswick, Canada Alvin Albert Jones, CFP, CLU, Toronto, Ontario, Canada Alain Poirier, Saint-Lambert, Quebec, Canada Eli Schochet, CFP, Toronto, Ontario, Canada Twyla Dawn Hardham, Kelowna, British Columbia, Canada Elke Rubach, LL.B, CLU, Toronto, Ontario, Canada
Staff Liaison(s):	Lena Polishuk

**MEMBERSHIP COMMUNICATIONS DIVISION 3  
COMMUNITY LEADERS TASK FORCE - USA**

**OBJECTIVE:**

Represent MDRT to promote membership and increase member engagement among peers in the local community.

**CHAIR SUMMARY:**

This year we will be focusing on promoting the value proposition of MDRT membership through educational Local Area Networking (LAN) events, meeting “pop-ups”, increasing the frequency of interactions with members to promote membership opportunities (PGA, service projects, meetings) or recognizing achievements and capitalizing on access to distribution channels through existing relationships.

Goals:

1. Create two to three daytime Local Area Networking (LAN) events in each market with an active Community Leaders member.
2. Develop with MarCom approved content for email invitations that can be sent by local task force representatives to constituents about upcoming events or recognizing achievements (i.e. first-time member, first-time Top of the Table, first-time Annual Meeting).
3. Develop with MarCom how we can more actively contact LAN attendees who may be a non-member, aspirants or new member).
4. Identify and connect with centers of influence within to carriers or distribution channels (i.e. AXA Branch Champions, Directors of SFSP chapters) and local mentors.
5. Promote the new MDRT Academy to local corporate relationships.
6. Develop a list of MDRT members willing to share their time and insights at local meetings.
7. Work with MDRT and MDRT Foundation representatives to establish guidelines to create and promote a service event with any carrier/Broker Dealer (BD) or professional association.
8. Create a playbook that will include samples of approved content, names and contact information for centers of influence within carriers, members who are willing to share their time at a LAN and a directory of locations that have made space available to conduct LAN events.
9. Develop a reporting process that lets task force members provide feedback about the development of their event, as well as enlisting support promoting these events through the connections of task force peers located throughout the country.
10. Develop a framework for potential subcommittees that will be responsible for specific facets of the task force’s efforts (i.e. aspirants, charity projects, book clubs, LAN development).
11. Identify candidates who can help expand the task force footprint in future years.

**GLOBAL COUNCIL MEMBER COMMENTS:**

David and Dana have done an outstanding job of building the Community Leaders Task Force success. We met in Chicago August 15 and 16 with MCC. We had a second meeting last week at the EDGE meeting in New York City. It was the meeting before the meeting. We had a number of members from Canada and the USA attend the meeting in New York. We discussed and outlined what value we can bring to the USA and Canada as far as LAN is concerned plus all other benefits of MDRT.

This task force is really taking on a life of its own. There have been a number of successful LAN meetings thus far. A number of ideas were discussed at the meeting in New York as to how we can add value to participants who are MDRT members and those who are NOT MDRT members.

## **MEMBERSHIP COMMUNICATIONS DIVISION 3 COMMUNITY LEADERS TASK FORCE - USA**

All three task forces within MCC Division 3 are right on point as far as, “how do we engage non MDRT members” to become a part of what we all know is of great value to continued success in development of one’s career. This task force has done the most work thus far, and is clearly on the “front line” of some of the changes MDRT is making to bring members back to MDRT from Canada and the USA.

### **CHALLENGES TO CONSIDER:**

The scope and complexities of interacting with a large and diverse population is to develop a team-based model that has the task force members sharing information, experiences and support. Until now, all members have acted independently of any other growth team member and have focused on whatever action they found to be most comfortable

As well, several current task force members have expressed the desire to continue to focus on promoting MDRT through their carrier/BD relationship and that they are uncomfortable focusing on the development of LANs. The relationships and commitment of these members is of high value but we will need to develop in the future other members in these areas who focus on creating LANs and sending approved content throughout the year.

### **OPPORTUNITIES TO CONSIDER**

I believe that creating educational LANs that showcase MDRT members from specific carriers, BDs or associations will allow us to more effectively promote the value and resources of MDRT to non-members from these organizations.

### **MEMBER RECOGNITION**

While this is a relatively new task force many of the members have been willing to actively pursue opportunities, relationships or start building our playbook.

These members include:

1. Julianne Dahrooge who has begun to develop ideas how we can improve engagement and contact points with new members, aspirants and mentors.
2. Elisa Chan – has contacted and met with the leadership of Polkadot Powerhouse, a North American female networking group, to learn more about their semi-monthly “pop-up idea sharing meeting they conduct on a local basis.
3. Terri Krueger – she chose to fly to New York City and stay over at her own expense to attend a LAN set up by Paresh Shah and me. Terri also expressed a strong interest in pursuing relationships with WIFS chapters.
4. Paresh Shah - has agreed to serve as a point of contact and support for all fellow task force members creating LANs.
5. Curtis Maitland – has already contacted the leadership of his BD and has created an opportunity to talk about MDRT.
6. R.J. Kelly – has already been calling previous members to encourage them to rejoin (already has had success).
7. Steven Wang – unsolicited, he is setting set up a WeChat group to allow members to share information and experiences.



**MEMBERSHIP COMMUNICATIONS DIVISION 3  
COMMUNITY LEADERS TASK FORCE - USA**

**PARTICIPANTS**

ExCom Liaison(s):	Randy L. Scritchfield, CFP, LUTCF, Damascus, Maryland, USA Peggy Tsai, RFP, CCFP, Taipei, Taiwan
Global Council Member:	Marc A. Silverman, CFP, ChFC, Miami, Florida, USA
Chair:	David C. Blake (USA), Harrison, New York, USA
Members:	John R. Benton, ChFC, CLTC, Warren, New Jersey, USA Leon D. Brand, Cypress, Texas, USA Elisa Chan, Worcester, Massachusetts, USA Timothy Daniel Clairmont, CFP, MSFS, Lake Oswego, Oregon, USA Julianne Dahrooge, CLTC, Worcester, Massachusetts, USA R. J. Kelly, RICP, MSFS, San Diego, California, USA Vijay K. Khetarpal, AIF, CFP, Tysons Corner, Virginia, USA Terri E. Krueger, Syracuse, New York, USA Curtis L. Matlin, CLU, ChFC, Northbrook, Illinois, USA John F. Nichols, MSM, CLU, Chicago, Illinois, USA Paresh B. Shah, CFP, Hicksville, New York, USA Steven Wang, Irvine, California, USA
Staff Liaison(s):	Lena Polishuk