



**MDRT**

The Premier  
Association of Financial  
Professionals®

## MEMORANDUM

**Date:** April 23, 2013  
**To:** Executive Committee  
**From:** Stephen P. Stahr, CAE  
**Subject:** MDRTeam Report  
**File:**  
**Copies:** MDRT Leadership  
Past Presidents

### I. MARKETING and COMMUNICATIONS

- **Media Relations Activity (January – February):** Coverage as a result of MDRT’s proactive ongoing media relations program reached 3.9 million for the first two months of the year. Print and web articles were featured in: *Advisor Today*, *Life Insurance Selling*, *Senior Market Advisor*, *El Asegurador (Mexico)*, *LifeHealthPro Webinar*, *LifeHealthPro “Life Insurance” Channel*, *LifeHealthPro “Your Practice,” Channel Producers eSource*, and *“the New Model Advisor Blog”(UK)*.
- **2013 Experience meeting marketing and communication efforts (January - March)** *Save the Date* post cards have been developed and translated into the needed languages for upcoming MDRT days. Promotional fliers, posters and a registration book will be developed prior to the MDRT Annual Meeting. The 2013 Experience Meeting Marketing Task Force is also assisting with suggestions on messages that will resonate in the meeting’s target markets.
- **The Top of the Table marketing plan is completed and being implemented.** *Save the Date* postcards, ads and registration materials for the Top of the Table Annual Meeting are in production. Information about the meeting will be distributed at the upcoming AALU meeting.
- **The 2013 marketing plan for the Annual Meeting is still underway.** As of March, marketing efforts have yielded 352,795 impressions with 4,444 actions taking place. Registration is tracking ahead of previous years. The focus is now shifting to onsite signs and print materials. The team is developing a new packet with pre-meeting information for the attendee and ways to integrate the traditional program book with the new ConneXion Zone program materials. First time attendees and a campaign to those who were first timers in 2012 are underway as well.

- General (non-meeting specific) MDRT marketing and communications initiatives (January - March) include a new Member Benefits brochure and a Mentoring 101 brochure.
- The Power Center Store represented MDRT at the GAMA meeting in March, resulting in sales of 11,714 USD and the MDRT Experience meeting in February with sales of 30,271 USD. Overall, first quarter sales have been strong with 88,626 USD – more than 23,000 USD over the first quarter sales goal of 65,000 USD.
- The Power Center/Customer Service team has been working diligently on the redesign of the MDRT Store e-commerce website that is scheduled to launch in May.
- Committee support: Ongoing execution of committee initiatives to include Best Practices Division; updating of the Business Continuation web resource; distribution and analysis of the Bottom Line Task Force survey; gathering of the life productivity profiles for the Task Force for a Big Life; mentoring monthly features; and committee authored articles for publication. Distribution of the 2013 committee evaluations.
- Preparing preliminary work for the upcoming organizational year: Providing insight and recommendations for 2014 organizational year; committee charges development; Divisional Vice President and Committee Chair invitations; development of an automated web-based system for committee member invitations; “Book of Names” preparation; planning for DVP/Chair Training; committee chair meeting preparations; and preparations for staff liaison training.
- *Round the Table (RTT)*: Switched to a new international mailing vendor to improve delivery to all members, with a special focus on India. So far, we have received very few member complaints about non-delivery. Implementing co-mailing process to reduce postage charges and bring consistency to delivery dates within the U.S. Will begin with the May/June issue, pending timely USPS approval of required paperwork.
- Developing relationship with LIMRA to provide content for *RTT*. First article will run in May/June issue, and we have tentative plans for a second in Sept/Oct issue. Kicked off a series on business continuation planning (all-encompassing term for succession planning) in the Jan/Feb issue and plan to continue it for the next year or longer.
- Created an editorial mission statement for *RTT*: *Round the Table (RTT)* is a magazine for the world’s best financial professionals. Delivering business solutions, transferable ideas, practice management and technology tips, *RTT* provides relevant content for producers at every career stage. As the official publication of the Million Dollar Round Table (MDRT), *RTT* connects members with each other through profiles on producers around the world and information on MDRT’s programs and events. Submitted *RTT* for professional critique by a

journalism professor emeritus who has specific expertise in association Publications. A couple of his comments: “Lives up to the mission statement quite well – if not exceedingly well.” “A most professional-looking publication.”

- *Proceedings*: Top of the Table *Proceedings* edited and posted online for members in early January. Annual Meeting *Proceedings* focus session editing complete, awaiting Main Platform manuscripts.

## II. MEETING SERVICES

- Main Platform - A successful March Rehearsal was held March 10-13. The Main Platform schedule is final and we are in the process of scheduling onsite rehearsals.
- Focus Sessions - Focus Session room assignments have been made. There are 10 rooms being used at the Pennsylvania Convention Center. Two rooms are being used at the Marriott. PowerPoint visual aids were due March 15. Of those expected, all but 4 have been received. Speaker liaisons have been assigned to each session and will be sent the Introduction later this month. Housing for the non-member speakers is currently underway. Five of the six Idea Exchange facilitators have been identified. Besides English, there will also be Idea Exchanges in Cantonese, Japanese, Korean, Mandarin and Spanish.
- MDRT Got Talent - We have received three total entries to date. Only one entry was complete. MarCom is in the process of creating a list of all marketing efforts completed so far to give to the Executive Committee. PDC has identified the three judges and we are currently working with Williams Gerard to decide on the text to vote component of the Got Talent judging process.
- MDRT A/V Requirements - Stage Design 90% complete for Marriott High Production Room. Freeman to send over stage design that includes MDRT stage banners. Awaiting individual room AV quotes this week from Freeman. AV specs for Misc., Special and Focus Sessions will be completed this week.
- 2013 MDRT Annual Meeting Exhibits and Sponsorships: We have two sponsors: 1) Platinum/MetLife – sponsoring tote bags, note pads and foosballs; and 2) Bronze/Penn Mutual – sponsoring popcorn for one day and pop-a-shot basketball. 35 Exhibitors (25 paid and 10 complimentary/Swap with); 17 Premium, and 18 Standard Pods. One Big Idea Theater, three companies signed up for Company ConneXion Zone passes. Total committed revenue is \$300,500. 81% of budgeted revenue.
- MDRT Annual Meeting ConneXion Zone: The ConneXion Zone is coming together nicely with the look and feel blending in with Registration and Power Center. ConneXion Zone will have the following fun zone items: pop-a-shot basketball, ping pong table, foosball table, Pac Man, Battle Royale and Super Kixx Dome Soccer as well as an upright piano. The Fun Zone, Speaker Zones, Tech Zones, Big Ideas Theater and Great Conversation areas have new and exciting

programs scheduled offering members an opportunity to network and learn from the best.

- 2013 ConneXion Zone Speakers - Speakers have been scheduled in Speaker Zones, Great Conversations, Big Ideas and the Technology Zone. A mix of nearly 200 U.S. and international sessions has been scheduled. Schedule and Speaker Contracts are currently in the works.
- MDRT AM Out of the Box Sessions/Special Events: The following are scheduled special events, along with numbers of those registered to date: Saturday, June 8, In the Round with Roundabout (66), Monday, June 10, Wind Uncorked (54)- Sold Out, Tuesday, June 11, Brewmaster's Delight (56), Saturday – Wednesday, Philadelphia Tourz@Go, Sunday – Tuesday, Run to Rocky (Sun 168/Mon 151/Tues 107), Monday – Tuesday, Zumba (Mon 103/Tues 88) – Sold Out, Monday – Tuesday, Relaxation Break (Mon 195/Tues 183) – Sold Out.
- MDRT Housing: 4,578 total room nights. Courtyard Marriott (\$196 rate) – 957 room nights sold, 708 committed, 15 waitlist, 6 room available for sale. Hotel is sold out. Hampton Inn (\$173 rate) – 196 room nights sold, 256 committed, 0 waitlist, 5 available. Hotel is sold out. Hilton Garden Inn (\$206 rate) – 283 room nights sold, 192 committed, 3 waitlist, 5 available. Hotel is sold out. Marriott (headquarter - \$224 rate) – 2,936 room nights sold, 2,229 committed, 13 waitlist, 69 room nights remaining for sale. Embassy Suites – (\$207 rate) – 206 room nights sold, - Sold Out. VIP Housing list is compiled and will be sent with specs.
- Annual Meeting Registration – (As of 4.12.13) Total registrations received is 3,027. Total members registered is 2,758. Total paid registered is 2,864 at \$695 for a total revenue of \$1,990,480. Total US members registered is 896 and Total Members registered from outside the US is 1862. Early registration deadline is April 21, 2013 at 11:59 p.m. EST. Monday, April 22 the registration fee will increase \$200 to \$895.
- Annual Meeting Program Book and Website - Annual Meeting program book is in the final stage of design edit review. The book will be printed in English, Korean, Japanese, Spanish, Cantonese Chinese and Mandarin Chinese. Annual Meeting website has undergone a renovation and the new updated version is currently live. Much more information is available to enhance the attendee pre-meeting experience.
- Top of the Table AM Program – 10 Main Platform Speakers have been selected for the Top of the Table Program. All have been contracted with the exception of one which is in the final negotiation phase. The opening speaker has been contracted. A call for Focus Session member speakers has been sent out. The registration brochure and website are currently in production. Spouse sessions are being researched and finalized to include in the registration brochure.
- Top of the Table Industry Relations - 15 Sponsorships have been sold which total \$300,000 (1 Platinum, 4 Gold and 10 Silver). NFP will sponsor the mini iPad for

the Annual Meeting attendees. Budgeted amount is \$325,000; however, in order to allocate \$50,000 to the mini iPad, the committee will need to raise \$375,000.

- Top of the Table Reception at AALU – Logistical arrangements for the reception to be held on April 28 from 5-6 pm at the Marriott in DC are being finalized. 176 invitations were mailed out to MDRT and Top of the Table members with a current response at 87. Top of the Table Advisory Board members scheduled to attend reception: Denny Zahrbock, Randy Scritchfield, Jason Dudum and Dale Martin. Red ties, name badges and Top of the Table lapel pins will be worn.
- Top of the Table Advisory Board – The Advisory Board holds monthly conference calls to review the activities of the individual committees. Each chair is doing an outstanding job completing their charges. The first US Top of the Table on Tour will occur on April 19 at the NAIFA MN. Top of the Table is covering expenses for seven speakers. Three will appear as individual speaking slots and four will hold a panel discussion. The two Advisory Board member speakers are Denny Zahrbock and Dale Martin.
- Top of the Table Nominating Committee - The Nominating Committee has met and Jason Dudum has been approved as the 2014 Top of the Table Chair, Dale Martin as the 2014 Vice Chair and invitations have been sent out for the chair positions: Ian Green – Program Committee Chair; Mark Hynes – Marketing and Communication Chair and WJ Rossi – Industry Relations Chair. The 2014 Top of the Table Advisory Board will hold an orientation session at the MDRT Annual Meeting.
- Top of the Table at MDRT - Planning is in process for the Top of the Table Receptions, Meet & Greet, golf shirt distribution, and the Celebrating Leadership dinner and Advisory Board orientation. Advisory Board onsite schedule has been distributed. Court of the Table/Top of the Table moderator remarks are in first draft format.
- Experience Speakers - The 2014 Experience PDC is a new committee which is meeting for the first time in Kuala Lumpur April 14-16. Committee members will develop a strategy and plan for the Main Platform in Kuala Lumpur 2014. Speaker review policies and procedures will be established and the first reviews are scheduled to take place during the meeting.
- MDRT Connect - Work has begun on establishing a webinar development process. Webinars will be a regular schedule component of the MDRT Connect schedule. Member/committee driven webinars will begin in the 2014 committee year.
- PGA - The theme of this year's PGA continues to focus on clarity and communication and will be addressed at the PGA Orientation also. PGA is prepared to provide assistance to the women of the Executive Committee according to the schedule and meeting place(s) provided by staff. The DVP, Chairs and Traffic Directors completed a successful site visit to Philadelphia March 25 – 26. A need for more Traffic General Volunteers was identified and

will be recruited as a result of this site visit. There are over 225 volunteers signed up, which is ahead of pace. In their second conference call to take place during April they will be discussing the volunteer schedules, PGA Orientation agenda, personal itineraries, proper attire and use of the PGA suite. The directors were very effective in rewriting into a more instructional format the Volunteer Duties & Responsibilities for their respective task force. They have been submitted for translation. The team is excited to have this new tool to work more effectively with our non-English speaking volunteers and creating a positive PGA experience for them at the Annual Meeting. The PGA/PDC dinner will be held at Del Frisco's Steak House, e-vites will be going out by the end of the month. We are collating and looking forward to the production of the third annual MDRT PGA Family Time Yearbook. The gifts from the First Vice-President have been ordered. Most importantly, the PGA Hats are now in-house at MDRT. The PGA DVP and three chairs are in place for the 2014 Annual Meeting.

- Experience Meeting PGA - The 2014 DVP, Chair and staff will hold their first official conference call later this month to review the Book of Names and create the list of names from which the 2014 Directors and Assistant Directors will be invited. The Chair and Assistant Chairs will attend the 2014 Experience Division meeting in Philadelphia. The three of them will also meet separately for a brief, informal meeting in Philadelphia to get to know each other and discuss initial activity. The date of the first committee meeting has been set for September 25-26 in Kuala Lumpur, Malaysia.
- Special Events - Food, drinks, decor, deposits and guaranteed counts are being finalized with vendors and venues for the PGA/PDC dinner in the Vault Room of Del Frisco's Steak House, the Excalibur Reception at the historic Union League of Philadelphia, the Court of the Table - Top of the Table Session and program at the Marriott Grand Ballroom, The Welcome Reception in the awesome Grand Hall and former head house of the Reading Railroad - where we will celebrate with a Monopoly theme, the Appreciation Reception at the Marriott Grand Ballroom, and the Closing Reception featuring the all-new MDRT's Got Talent and the Party on the Platform with the LA Stars.

### III. MEMBERSHIP SERVICES

- More than 38,300 applications for 2013 membership have been received, of which 35,600 have been approved. If current trends hold, MDRT will have its second highest membership ever. The membership processing team continues to focus on customer service related to resolving applications with problems and assisting members with questions related to production, requirements, and annual meeting registration.
- The mailing of 2013 membership certificates was faster than any other year.
- The creation and implementation of the automated pay portal and emailed problem letter programs have enabled members to submit dues and be notified of any membership issues with their application in an enhanced and timelier fashion.

- Sponsorship for the 2013 MDRT Experience exceeded the targets and totaled USD 450,000. Solicitation for the 2014 MDRT Experience Meeting is underway, with one commitment for Platinum level sponsorship. Meetings with potential sponsors have been held in Malaysia and Hong Kong.
- The Executive Committee, MCC leaders and staff promoted the benefits of membership and the value of collaboration with MDRT to CEOs, CAOs and other senior executives at life insurance and financial services companies in more than a dozen countries.
- Staff partnered with NAIFA Chicago and local MCC leaders on a joint MDRT/NAIFA event for Chicagoland agencies in February. Since the event, staff has given MDRT presentations to producers and managers at three agencies.
- Sixteen ambassadors have been deployed to 11 countries for speaking engagements at various MDRT Days, association and company events.
- Staff developed a framework and is making logistical preparations for a CMO session at Annual Meeting.
- Collaboration continues with Meeting Services staff on development of the Gateway to Growth session for independent channel attendees.
- Staff is managing the promotion and registration process for aspirants, agency managers and the NAILBA offering.

#### IV. GLOBAL MARKETS

- Started looking at where MDRT needs to be this year in order to have another successful membership year in 2014. In the first four months of the year, staff has either traveled to or has helped to coordinate Executive Committee and MCC leaders', and Ambassador's travel to fifteen countries.
- We are wrapping up the 2013 MCC year with the usual attention on membership and Annual Meeting registration and preparing for 2014 with the incoming DVPs, Region Chairs and Zone Chairs.
- The Asia Pacific Office and service centers in China and India have been supporting the membership and Annual Meeting promotion efforts. A freelance Vietnamese translator has been identified to assist us to communicate with members and companies in Vietnam. Chester Chu traveled with the Southeast Asia MCC Zone Chair to all of the member countries in the zone to meet with the respective MCC teams and with companies.
- Two staff members will be added to Global Markets by the end of May.

V. EMERGING MEDIA

- The 2013 Annual Meeting website continues to receive great reviews as we close in on the early registration deadline. Information is still being created and edited for the site as it becomes available.
- Preparing for the Annual Meeting with the regrouping of the Tweet Team, on-site social media promotions, and the creation of a wide assortment of video promos, teasers, bumpers, and slides. We are also making arrangements for the capturing of meeting highlights and interviews for use in later videos and promotions.
- MDRT has reached a significant, Social Media-related goal with regards to brand ambassadors. Brand ambassadors develop over time when people engage in our social media channels and believe in our brand. This year, we finally have members/speakers tweeting about registering for our meeting without us having to encourage or ask them to. We're at the very beginning of this and it's exciting to have people outside of the organization carrying our brand for us.
- We have chosen a vendor for the Digital Asset Management project and are now collecting assets for transfer and posting.
- [www.mdr.org](http://www.mdr.org): has been visited 177,733 times this year from 151 countries. Most users came from United States, India, Singapore Canada, Hong Kong, and Canada. The translated sites continue to receive healthy visits: Chinese (Traditional) – 2,514; Chinese (Simplified) – 1,837; Japanese – 2,459; Spanish – 635; Korean – 1,294.
- In the first quarter of 2013, [www.mdrfoundation.org](http://www.mdrfoundation.org) received 4,524 visits from 96 countries. The most popular countries are United States, India, Canada, Hong Kong and Taiwan. The most popular pages continue to be around the grant application and process pages for both the World Wide and Quality of Life grants.
- MDRT Network has been visited 11,013 times with most users coming from United States, India, Canada, United Kingdom, and Australia.

VI. IT

- Rewiring of MDRT Headquarters is complete, providing at least two connections for each work area: one for data and one for a future phone connection. The entire staff was migrated to the new network in late March.
- AT&T Fiber connectivity to the internet was implemented on March 26. This provides more than 2x the capacity of the previous connections and saves over \$4,500 annually.



- WebFOCUS Business Intelligence tools were purchased and are being implemented for MDRT staff and leadership. This will provide easier access to corporate information, provide self-service functions for staff to extract and view data, and provide up-to-date dashboards for critical information.
- A project to provide an Online MDRT Membership Application is underway and scheduled for delivery for the 2014 membership year.
- A new function to store Speaker information (historical and for future considerations) and make it easily available to staff and leadership is in progress.
- Automation of the Committee Invitation process is in progress and due for delivery in time for the 2013 Committee Invitation process after the Annual Meeting.
- In-house custom programming requests from staff are being completed daily.
- Ongoing support and maintenance of CAS membership software.
- A review of all telecommunication services is underway to ensure we are receiving appropriate services at the best cost/service levels available.

## VII. FINANCE

- Supporting Membership
  - processing of the remainder of the 2013 applications and dues payments
  - processing refunds and reversals
- Preparing for the MDRT Form 990 filing
- Developing and evaluating the 2014 Foundation budget
- Compiling the monthly financial statements for both MDRT and MDRTF
- Transitioning the organization to a new travel company
- Participating in the Online MDRT Membership Application development process
- Supporting the 2013 Annual Meeting
  - Reconciling the registrations
  - Obtaining the relevant business licenses

- Securing the appropriate equipment – cash registers, data capture machines, etc.
  - Updating the cashiers training materials
  - Updating the inventory information
  - Accumulating the shipment information for insurance purposes
- Interviewing candidates for Accounting Manager position
  - Finalizing the Operating Reserve Fund Investment Policy Statement

#### VIII. HUMAN RESOURCES/PROFESSIONAL SERVICES/CALL CENTER

- Working in collaboration with the Hay Group to develop a Performance Management tool and training materials to deliver to staff. We are continuing to identify potential leaders within staff and providing complete and thorough assessments to each individual.
- Actively working on recruiting to include candidate screening, scheduling interviews, and employment testing.
- Implementing new payroll upgrade
- Introducing new Time and Attendance and Web Based applications to staff
- Reviewing compensation ranges
- Developing lunch-and-learns and identifying training applications for staff members.
- The Call Center has fielded over 2,500 calls since the beginning of the year.
- Professional Services is heavily immersed in Annual Meeting season responsibilities.
- Providing administrative support for Foundation Phone-A-Thon in Indianapolis.
- A Professional Services staff member is traveling with the Foundation to assist with the Foundation Riley Build.
- Gearing up for committee season to support 21 committee meetings.

IX. BUILDING SERVICES

- Mail (outgoing approval letters and certificates) and product orders processed up to date.
- Processed returned Experience Meeting shipment from India.
- Pricing and packing of Annual Meeting Power Center items in full swing.
- Completed women's restroom renovation on all three floors.
- Completed replacement of general lighting upgrades throughout building to more energy efficient light fixtures.
- Annual fire panel and devices inspection completed.
- Reviewing lobby renovation design and budget proposals.
- Repairs to parking lot sewer completed as necessary.

X. MDRT FOUNDATION

- The Foundation is working with Meeting Services and IT to eliminate the donor card. All members will have the Foundation "ticket" in their packet of tickets/name tag and would only need to check off the amount and hand it in with their payment form. The Foundation will have four credit card machines plus two iPad squares to process donations. We are expecting that this change will dramatically reduce lines and processing time, while increasing the number of donors.
- Coordinating with *Free the Children* and developing all Foundation activities and marketing materials for the Annual Meeting. Our Main Platform charity is *Free the Children* and our "promise appeal" is to encourage members to write on the Foundation "Doodle Wall", located at the booth, about what freedom, community and family means to them.
- Financial Highlights – The MDRT Foundation continues to maintain a strong financial position with increasing individual donations as well as increasing growth in our investment portfolio. As of March 31, 2013, the Foundation has reached \$3,316,480 in total income as compared to last year total income which was \$2,263,985. Our net income over expenses for March 31, 2013 is \$2,263,985 which is significantly higher than the \$1,330,085 net income over expenses.
- The spring Phonathon hosted by OneAmerica was a great success. Donors contributed more than USD 326,698 in pledges and USD 122,622 of in-house contributions. These figures represent a record high for in-house contributions and

a 30 percent increase in the number of individual donors from the last Phonathon. These totals represent an increase in total donations of \$7,000 over last year's spring Phonathon.

- The Foundation Spring Board meeting brought about two major actions: Uniform Donor recognition for all donors to MDRT Foundation and its affiliates for their total aggregate giving. This recognition is starting immediately and will be phased in over the next several months.
- The second major decision was to award a USD 500 grant to the MCC Region and Zone Chairs starting in fiscal 2013. Both of these major decisions are a part of the Foundation's Continuing Strategic Planning Process and goals to reach out to the MDRT Global membership.
- Strategic planning for 2013 – committees have been selected and notified. Two more surveys need to be conducted with the MCC Committee Chairs, Zone, Country and Company chairs sometime in the next week. We are in the last stages of the strategic planning process.
- India and board members have made visits and follow-up calls to corporations for sponsorships. We are working to reach a new goal here. New relationship established with National Life of Vermont. Special Presidential gift from MassMutual in honor of President D. Scott Brennan and ongoing follow up with international corporations for global partnership.
- Service Project – The MDRT Foundation is partnering with Riley Hospital and their Camp Riley for children with disabilities. We have a volunteer team of 20 people going to Indianapolis May 1 -3, 2013 to help build a fence around a therapeutic horseback riding center. This is a great opportunity for MDRT members to get involved in the Foundation and to do hands-on volunteer work.