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Editor's Note

Team MDRT,

I hope all of you had a joyous Thanksgiving with your family and friends and had the chance to disconnect from the hustle and the bustle of the digital world and be present with those you love!

We at K+C have had some time to reflect and wanted to give thanks to having a great partner like you! We are beyond grateful to work with individuals who are always ready to roll up their sleeves, with enthusiasm and dedication, and strive towards our shared goal of bringing new things to life.

From the bottom of our hearts, thank you for all the incredible hard work you've dedicated to this project this year; we are excited to continue our journey in the next couple of years and reach new heights together!

2021 is almost over, thus this will be our last Newsletter for the year, where we'll provide a high-level summary of what we've accomplished as well as highlight a couple of things we are looking forward to in the coming year.

If you have feedback on how to improve the program for 2022 or any other thoughts you'd like to share, please let us know by clicking on this [link](#). Or feel free to email Ashley Ikromova with any suggestions <ashley.ikromova@kinandcarta.com>. We can't wait to hear from you!



General Overview

Let's take a step back and remember why we embarked on this journey...

K+C & MDRT decided to embark on a multi-year digital transformation journey together in order to become the leading technology-driven association globally. Our goal from day one has been to empower the staff by reducing burdensome processes, enhancing the technology platform, and improving the member experience through more enriched and personalized experiences.

2021 was all about laying a strong foundation...

We are ending our year one (the transformation phase) on a strong note, and that is worth applauding. Our success and progress would not have been possible without the hard work of every single person that was involved in this project. Although there is still much more work to be done, the phase 1 aspect of the project sets us up for success, and this is just the beginning of our journey.



During this year, K+C started to operate under two major work streams: Experience and Data.

Our intention behind the Experience workstream has been to provide seamless, connected, digital experience touchpoints that would enrich the existing offerings and meet members where they are while empowering staff to make Data-driven decisions with "invisible" technology.

And our intention for the Data workstream has been to centralize and democratize data in order to enable a truly personalized and optimized experience for members, while providing MDRT staff access and intuitive use of customer data to enable data-driven decision making.



Together, we accomplished A LOT this year!

We redesigned and launched MDRT.org and the online membership application, WoHoo!!! This is a very big step in the right direction.

A huge thank you to everyone who has been part of this thread of work, especially to our MDRT stakeholders. Together we spent hours reviewing hundreds if not thousands of designs, reading detailed documentation and so much more. Your expertise and knowledge has been crucial in getting us to this point and we thank you for your incredible partnership!

Now, the changes provide an enhanced authentication process and a large set of templates and blocks to easily and quickly develop pages and content on the new site. If you haven't had the chance to check out the new website, I would highly recommend it. As you navigate through the website, the first thing you'll probably notice is the clean and modern look and feel, which both K+C and MDRT worked hard to establish. Also, we made sure that the member benefits are visible and easily accessible throughout the site. Additionally, we removed dead ends to ensure that there is always a path members can take to learn more about MDRT.

The technology arm of the project started identifying platforms that will enable / support personalization and insights for both members and employees. After many meetings with various vendors, conducting rigorous reviews, and thoughtful deliberation, we selected several different powerful softwares, such as Digizuite and Optimizely to name a few, that will be the backbone of the sophisticated digital experience we are striving for.

In 2021, the Data team worked extremely hard to set up the foundation for the underlying data technology, which is one of the most crucial components of the digital transformation journey.

The team made tremendous strides in developing a clean and unified view of who MDRT members are and how they are engaging with the company across online and offline channels. This process was accomplished by leveraging the strength and power of three data sources: Aptify, Bronto, and Web Behavioral data. Additionally, they build robust reporting capabilities and models. For example, they're in the process of finalizing the Email Engagement (EE) dashboard, which monitors the broadcast of emails for successful transmission and any action taken, measured as an Indexed score per person/member: this covers bouncing email, categorization if read, if clicked call to action. The company Rankings dashboard is also being worked on, which duplicates the external MDRT Company Rankings report as well as trends over the last 5 years.

Furthermore, the team created two models, each looking at a different aspect: Likelihood to Renew, and Activity Engagement. These models are used together to divide the member base into audiences. Each audience contains a different demographic of members, and so allows us to tailor member experience to their needs.

What's next?

We believe technology and data enable the "Experience", i.e., how members and staff will interact with MDRT, its services, and its products. Given that we have strong technology in place, and we are continuously working on centralizing the data, our goal for 2022 and beyond will be to continue to improve the "Experience" for members and staff alike. This means we will continue to build upon what we already have, i.e., the website, and dive into personalization to ensure we provide members with the best possible cohesive experience and empower staff to make data-driven decisions with all the data tools we'll provide. As we've said many times during this project, this is a journey, not a destination. And this journey consists of continuously improving and iterating on the experience moving forward.

Currently, K+C and MDRT are working together to determine where they should focus next and determine what is the highest priority for next year. We are making educated, data-driven decisions based on what will bring the most value to the members and to the organization, in addition to assessing organizational readiness, which is making sure that we have everything in place to support the change, i.e., IT readiness. Thus, next year is not the end; we have a long list of things we want to accomplish and tons more value to add, and over time we'll get there, together.

However, as we start moving into 2022, the Data team will start to test the following hypothesis:

We believe in: Personalizing MDRT member communication journeys based upon members' needs

We'll achieve: An increase in member engagement with those communication journeys

So that: This will drive an increase in engagement with the MDRT digital user experience

So that: This will drive an increase in engagement with relevant key activities

So that: This will drive an increase in likelihood to renew

We will know this is true when: We have implemented personalized member communication journeys and measured impact on engagement and likelihood to renew

That being said, we have a lot of exciting endeavors ahead and we are excited to continue to share this journey with you!

November Experience Update

We've launched the MDRT website, however, our work doesn't end here. We are releasing new updates to production every week and have implemented several feature enhancements to the Optimizely site and bug fixes for the membership application. Our plan moving forward is to continue to have regular releases that will add value and continue to serve the members' needs.

Additionally, we have been hosting weekly training sessions with MDRT staff to work through various website changes together and as a result, have been training the staff on how to navigate and fix content bugs in Optimizely. The speed and the enthusiasm the team has been learning is very impressive.

November Data Update

A lot of work and effort from both K+C and MDRT went into developing the three dashboards: Email Engagement, Company Rankings, and Digital Engagement. The team resolved all the bugs related to the Email Engagement dashboard and is currently in the process of retesting it before it goes LIVE, our goal is to get it done by this week. The Company Rankings dashboard is also progressing, they've resolved all the bugs detected, and currently, one feature is in development. We still have some work to do with Digital Engagement, the team is started work on data modeling, which will be ongoing but our goal is to demo the MVP to our MDRT stakeholders in mid-December.

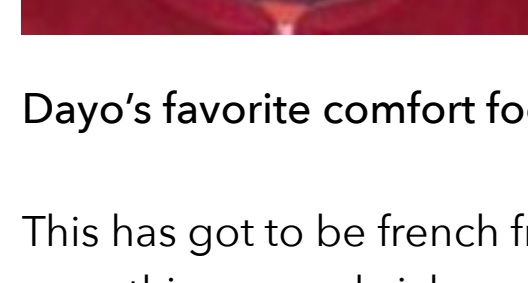
The Data team also completed the initial training of Power BI, which is exciting!

This was led with two distinct groups: Group 1 and 2. Group 1 completed all core modules and dashboards in a day's sessions, working on skill-building beyond core materials and integrating future data points. And Group 2 completed Introductory Sessions and 6 hours of Dashboard in a Day. While there is still more work to be done to complete the next module, we are in the process of scheduling.

We also have some updates on Bronto. As many of you know, MDRT currently uses Bronto as their campaign tool, primarily for sending email communications to MDRT members. However, Oracle (who created the product) has announced 'end of living' Bronto on May 31st, 2022 (the functional end of life is likely to be much sooner as they lose staff to support the product.). With this in mind, the Data team has been supporting MDRT with the vendor selection process to find and implement a suitable replacement.

Get to Know the K+C Team

Dayo Olowokande



Dayo's role on the project

I have a background in computer science and business administration, which I've put to use in the realm of Quality Assurance. On the MDRT project, I'm a QA lead, working with the developers, the designers, I design, and other key folks to ensure that the application being built meets the client's expectations.

Dayo's favorite comfort food

This has got to be french fries. The greatest "wingman" of all time! It goes with practically everything... sandwiches, chicken, steak, eggs, etc. It's strong enough to stand by itself as well (I see you poutine)! And you can never have just one! So yes, the french fries rule!

We want to hear from YOU!

Click on this link to provide your feedback.