



The Premier Association of  
Financial Professionals®

# *focused*

ON YOUR SUCCESS

## **MDRT and Your Company**

*Ideas for Recruiting, Supporting and Retaining Members*

### **RECOGNITION**

- Send a letter of congratulations to members for qualifying and joining MDRT
- Provide special recognition for branches with 100 percent of eligible producers joining MDRT
  - Announce in company newsletter
- Provide co-op advertising or press releases to local media in recognition of individual members
- Provide MDRT membership ribbons for agent name badges at company conferences
- Provide business cards and stationery with the MDRT member logo for MDRT members
- Recognize the agency with the highest ratio of MDRT members to qualifiers
- Purchase products from the MDRT Store for MDRT members
- Recognize MDRT members at company functions
- Purchase MDRT Power Phrase calendars for first-time MDRT members
- Publish a company-wide listing with the number of MDRT members in each agency along with the ratio of MDRT members to qualifiers
- Place ads in major industry publications and local media, including names and photos of all MDRT members in the company
- Reward those who join MDRT and attend the MDRT Annual Meeting with an extra day at the company sales leaders conference site

### **FINANCIAL**

- Offer a graduated payment scale of MDRT dues based on levels of achieved production
- Offer a payroll deduction plan for MDRT dues or Annual Meeting expenses, making it easier for members to pay
- Establish a corporate matching gift program for member contributions to the MDRT Foundation

### **QUALIFICATION**

- Integrate MDRT membership production requirements, including Court of the Table and Top of the Table, with company production club requirements
- Provide quarterly production status reports to producers and managers to track performance against production goals for MDRT membership
- Include the MDRT Production Goal Chart on the company intranet, providing agents with monthly goals to achieve MDRT membership
- Endorse and actively promote the MDRT Mentoring Program, providing incentives for participants
- Establish MDRT membership as a criterion for top agent honors and recognition

### **MEETINGS**

- Host a dinner, pre-Annual Meeting gathering or special reception at the MDRT Annual Meeting for attending members and mentoring aspirants
  - Recognize years of membership, Court of the Table and Top of the Table status
- Host a pre-meeting gathering of MDRT members at a company conference (national, regional or branch)
  - An alternative: Special day or program for members
- Invite an MDRT member to present at an agent conference
- Request promotional materials from MDRT and set up an information table at a company agent conference
- Hold an MDRT program during the company sales leaders meeting, open to all and conducted by MDRT members
- Designate a reception area for MDRT members to visit with clients

## COMMUNICATION

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- Designate space in the company newsletter (e.g., “MDRT Corner”) for information updates, member benefits, programs, testimonials and accomplishments
- Publish MDRT membership production requirements in field publications
- Link your company intranet to the MDRT website (mdrt.org)
- Promote MDRT membership and Annual Meeting attendance within articles in company publications and at company meetings
- List producers who are on track for MDRT, Court of the Table and Top of the Table qualification
- Distribute lists of agents who are on schedule for MDRT membership to the respective agency managers
- Publish MDRT member testimonials about the value of MDRT membership and Annual Meeting attendance
- Sponsor a company MDRT member advisory board to promote membership and professionalism, and provide sales ideas
- Establish an MDRT Advocate program, designating a member in each agency as the individual to promote MDRT membership and serve as the designated MDRT resource
- Establish MDRT study groups within select agencies
- Include MDRT recruitment information in company “new hire” kits
- Conduct interviews with MDRT Annual Meeting attendees to include in field publications
- Leverage online resources to enhance communications to your agents and raise awareness of MDRT benefits (e.g., *Round the Table* magazine and the MDRT Resource Zone)
- Purchase an MDRT Video Club subscription for agency managers

## PROCESSING

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- Participate in MDRT’s bulk application process to promote MDRT membership to nonmember qualifiers
- Distribute MDRT recruitment and marketing material to managers and agents
- Participate in MDRT’s electronic certification process to expedite application approval, eliminating the need for paper copies of certifying letters
- Provide MDRT members with a priority “fast track” to Underwriting and Compliance to expedite the application approval processing time

## FROM THE AGENCIES - “Out Here in the Field”

- Send a press release to local media for each MDRT qualifier, announcing his/her MDRT membership
- Create an “MDRT Wall of Fame” to include a photo of each MDRT member
- Promote agency participation in the MDRT Mentoring Program
- Use MDRT videos at agency meetings and training sessions
- Share the list of MDRT materials available to members and nonmembers in various languages
- Conduct special, stand-alone seminars and meetings for MDRT members only
- Select one MDRT member each month to chair a sales idea exchange meeting or review a Focus Session topic presented at the MDRT Annual Meeting
- Review the career benefits of MDRT membership with new producers in orientation and training classes
- Sponsor local MDRT events
- Promote your company’s MDRT membership ranking to your agency sales force
- Designate office space in the agency headquarters that can be used only by MDRT members for client meetings or for MDRT members to meet with each other
- Recognize MDRT members from your agency who have been appointed to serve in MDRT leadership positions
- Integrate MDRT resources into the agent training curriculum
- Attend the MDRT Annual Meeting through the Agency Manager Program to support your MDRT members and aspirants

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