

January

- From Company Headquarters:
 - Coordinate with MDRT to send personalized MDRT membership applications and certifying letters, along with cover letter of congratulations, to producers with 80% of MDRT qualification.
 - Send supplemental list of producers (@ 80% level and above) to MDRT for additional personalized applications.
 - Publish and distribute the "MDRT Minute."
 - Publish production requirements for the new year
 - Add MDRT Production Goals Chart to company intranet so that producers may set goals.
 - Send e-mail to all producers with a monthly MDRT "Power Phrase" (these can be found at www.mdr.org homepage).
 - From Branch Office:
 - Send e-mail to approved members encouraging them to enroll with an aspirant into the MDRT mentoring program. Provide link to online enrollment:
<http://www.mdr.org/membership/AboutMDRTMentoring.asp>
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February

- From Company Headquarters:
 - Send e-mail to all producers as a reminder to submit MDRT membership application materials before March 1 deadline. Remind them to register early for the MDRT Annual Meeting once approved for membership.
 - Send Annual Meeting Highlights DVD to each branch manager.
 - Publish and distribute the "MDRT Minute."
 - Send a reminder that registration for the Annual Meeting is now open
 - Consult with MDRT to find out which night(s) will be dedicated to company-hosted events at the Annual Meeting.
 - Send e-mail to all producers with a monthly MDRT "Power Phrase"
 - From Branch Office:
 - Follow-up e-mail from company headquarters with a branch meeting to promote MDRT membership and Annual Meeting.
 - Send e-mail to 50% qualifiers, reminding them that they can attend the Annual Meeting as part of an MDRT mentoring team with 50% of the required production. Deadline to enroll into the mentoring program for those that wish to attend the Annual Meeting is May 1.
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March

- From Company Headquarters:
 - Send e-mail to all agency managers promoting MDRT Annual Meeting Manager Attendance Program.
 - Publish and distribute the "MDRT Minute."
 - Send e-mail to all producers with a monthly MDRT "Power Phrase"
 - Publish a list of producers on track for MDRT membership. Include a list of producers within 80% of being on track. Distribute both to branch managers.
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April

- From Company Headquarters:
 - Publish and distribute the "MDRT Minute."
 - Send e-mail to all producers with a monthly MDRT "Power Phrase"
 - From Branch Office:
 - Send e-mail to all MDRT members, reminding them to register for the Annual Meeting. Remind them that Early Bird deadline expires this month.
 - Send e-mail to 50% qualifiers, reminding them that they can attend the Annual Meeting as part of an MDRT mentoring team with 50% of the required production. Deadline to enroll into the mentoring program for those that wish to attend the Annual Meeting is May 1.
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May

- From Company Headquarters:
 - Send e-mail to all approved members with link to the MDRT Member Benefits brochure. Include note reinforcing the value of MDRT membership.
 - Publish and distribute the "MDRT Minute."
 - Send e-mail to all producers with a monthly MDRT "Power Phrase"
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June

- From Company Headquarters:
 - Send e-mail to all approved members with link to the MDRT Member Benefits brochure. Include note reinforcing the value of MDRT membership.
 - Publish and distribute the "MDRT Minute."
 - Host an event at Annual Meeting for company attendees.
 - Send e-mail to all producers with a monthly MDRT "Power Phrase"

- From Branch Office:
 - Send e-mail to all Annual Meeting attendees, reminding them to "divide and conquer." Attend separate focus sessions to maximize information gathering for future branch meetings.
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July

- From Company Headquarters:
 - Send e-mail to all branch managers, having each begin monthly meetings conducted by members who attended the Annual Meeting, using focus session topics.
 - Publish the "MDRT Minute."
 - Host an event at Annual Meeting for company attendees.
 - Send e-mail to all producers with a monthly MDRT "Power Phrase"
 - From Branch Office:
 - Begin the series of monthly meetings conducted by Annual Meeting attendees, using focus session topics.
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August

- From Company Headquarters:
 - Send written letter to all producers, recognizing MDRT, Court of the Table and Top of the Table members for their success.
 - Send written letter to all "Honor Roll" producers – members who have had 15 or more years of consecutive membership with production.
 - Publish the "MDRT Minute."
 - Send e-mail to all producers with a monthly MDRT "Power Phrase"
 - Review and update company profile.
 - Review year-end statistics available on company section.
 - From Branch Office:
 - Conduct monthly "Annual Meeting focus session" topic meeting.
 - Send an e-mail to TOT producers reminding them to register for the TOT Annual Meeting.
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September

- From Company Headquarters:
 - Send e-mail to all producers, emphasizing the "push to qualify" for MDRT membership next year – Now is the time!

- Publish a list of producers on track for MDRT membership. Include a list of producers within 80% of being on track. Distribute both to branch managers.
 - Publish and distribute the "MDRT Minute."
 - Send e-mail to all producers with a monthly MDRT "Power Phrase"
 - From Branch Office:
 - Conduct agency MDRT recruiting and promotion meeting.
 - Include MDRT members on question & answer panel
 - Show MDRT Annual Meeting Highlights DVD
 - Distribute recruiting materials (available from MDRT)
 - Distribute production report for year-to-date MDRT qualification status.
 - Conduct monthly "Annual Meeting focus session" topic meeting.
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October

- From Company Headquarters:
 - Send recruiting letter and brochure to non-member producers suggesting they get ready to apply early for next year's MDRT membership.
 - Request brochure mailing follow-up by each branch manager.
 - Publish and distribute the "MDRT Minute."
 - Send e-mail to all producers with a monthly MDRT "Power Phrase"
 - From Branch Office:
 - Follow-up company mailing to non-members.
 - Conduct monthly "Annual Meeting focus session" topic meeting.
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November

- From Company Headquarters:
 - Send list of all eligible producers (@80% level and above) to MDRT for bulk application processing.
 - Send letter to all MDRT members notifying them that applications have been sent to those who have been a member of MDRT in the past two years.
 - Send letter or e-mail to all producers, pushing for a strong finish to the year. Announce that certifying letters will be sent / posted in January
 - Publish and distribute the "MDRT Minute."
 - Send e-mail to all producers with a monthly MDRT "Power Phrase"
- From Branch Office:

- Follow-up on company communication with producers reinforcing strong finish and reminding all about certifying letters for MDRT membership.
 - Send an e-mail to producers encouraging enrollment into the mentoring program
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December

- From Company Headquarters:
 - Send letter from CEO to all producers with holiday wishes, asking for a commitment to success for the new year and to become an MDRT member. Include quotes and notes from current, successful members.
 - Send new year production requirements
 - Publish and distribute the "MDRT Minute."
 - Send e-mail to all producers with a monthly MDRT "Power Phrase"