



Improving the enrollment leads process

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Project Overview

What is the MDRT Academy and who is it for?

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Identifying the problem

What did we learn through user and stakeholder research?

3

Solution and outcomes

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How are we measuring success?

Overview of the MDRT Academy

Let's review the ins and outs!

My role

I've been partnering with the MDRT Academy team for almost 3 years.

I've worked on several different discovery & evaluative research projects and over 10+ feature releases.

Focus areas

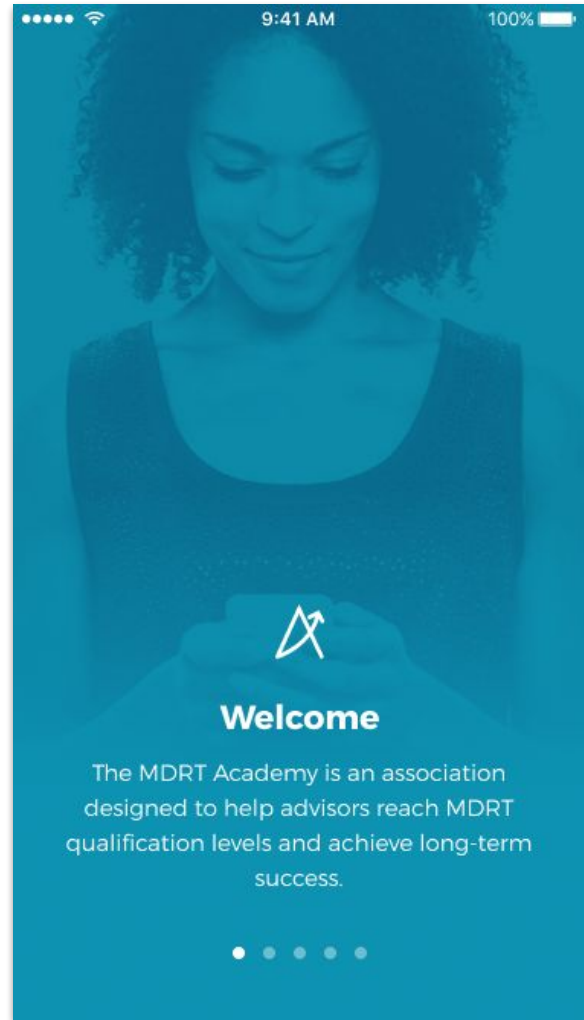
- Product Strategy
- User & Stakeholder Research
- Interaction Design
- UX Writing



MDRT Academy

A membership-based learning platform for insurance agents & financial advisors; launched in November 2017.

The goal of the MDRT Academy is to give its members the tools and resources to qualify for MDRT, which is recognized as the premier association for insurance agents.



Who's the intended audience?

Financial Advisors

ABOUT

- Often a recent career switcher/newer to industry
- Individual producer for larger organization
- On the road or phone meeting with clients /leads

NEEDS TO EXCEL

- Advice from those who have "made it" to MDRT
- Inspiring ideas to exceed sales goals
- Opportunities to build a large referral network

CAREER GOALS

- Meet sales goals
- Establish long term career path
- Qualify for MDRT, more for the status

DAILY PAIN POINTS

- Not enough time in the day
- Difficulty staying organized
- Consistent fear of doing or saying something "wrong"

Who's the intended audience?

*Insurance brokers
and agents*

ABOUT

- In industry for 5+ years
- Recently switched to an individual producer role

NEEDS TO EXCEL

- Advice from those who have "made it" to MDRT
- Access to better resources
- Hiring staff to help w/ admin

CAREER GOALS

- Build book of business
- Be independently successful
- Qualify for MDRT, more for the support

DAILY PAIN POINTS

- Not enough time in the day
- Balancing work & home life

Establishing priorities for 2020

Understanding the business and user needs to define a high-level product roadmap for 2020

2019 discovery activities

STAKEHOLDER WORKSHOP

Facilitated a full-day workshop with MDRT Academy's key stakeholders in **December 2019**

- Reflect on process and collaboration in 2019; identify opportunities for improvement
- Align on MDRT's business objectives for 2020

ANNUAL MEMBER SURVEY

Sent to all active MDRT Academy members in **November 2019**

- Better understand member usage & engagement, perception of value, unmet needs, etc.

Process Takeaways

get ahead of tech challenges	smaller releases
define stakeholders & dependencies up front	more holistic release planning, including communication strategy
increase user touch points	marketing & stakeholder communication strong, keep improving
Analytics & Benchmarks	

Product Takeaways

define active user	revist levels
maintenance / optimization	continuous play for videos
Improve Webcast experience	Actually get members to connect

LOVED

ability to be in person at least once a month	ease of cross-team communication - relatively painless to get the right people	positive team - great attitude	willingness to collaborate - no silos	flexibility	connection / enrollment - it was the goal when we first met	love the evolution of the team & the product
collaboration between teams was constant	new features - bookmarks, assessment	guided tour	loved working together on enrollment and real teamwork/problem-solving	thorough planning: requirements, roadmap	ability to survey end users	collaboration - research & survey
that it feels like a true partnership between our teams	strength of data - listened to the users	positive feedback from users - seems to really be connecting	attitude (invested)	getting feedback from members, working with new marketing firm to do that	creativity: great content, ideas, and exploration	that we are stretching ourselves to come up with creative ways to engage & delight
that we are always thinking bigger picture	honest & openness: what works, what doesn't, etc	trust between teams to get right solutions	quick & concise feedback	connection - MDRT/MDRT Academy can be very complicated/complicated	the weekly growth plan & how it connects to content	basecamp interaction
communication / responsiveness	project management	innovative - quality of product (company feedback)				

LOATHED

talking about enrollment & changes needed throughout the year	communication plan around enrollment	putting in the strategy & effort to do research with members that will impact our ...	dependency on aptly & outages	unclear team dependencies around Enrollment updates - led to struggles around	Keep more members of our team at MDRT involved in meetings, etc	Enrollment - IT/Aptly (getting the right stakeholders involved)
That the Admin isn't as user friendly as we hoped	Admin: Labels, understanding user list	Don't understand analytics	IDS updates causing issues	tech challenges & server issues	Members want something tangible to share with their mentees	A few dropped balls on smaller/less intensive things to focus on larger issues
current MDRT member need this but don't know it exists	Lack of reporting from an email standpoint	Lack of strategy - marketing/communication points	Leaving a major lift until the very end	Wished we were able to present more precise proposals of budget and time points	I wish we had a way to get feature feedback sooner	cracking the nut of how members of the greater team view this product
connect	Less epic Release: go deep, not wide w/releases					

LONGED FOR

webcasts in app	autoplay	levels	easier registration & viewing of webcasts, easier ability to access archives	ability to pick up where you left off (videos)	community
community interaction	continue communication about what's available and how to best use the	fresh eyes on the marketing	more marketing collaboration	more collaboration with stakeholders	recruiting co with stakeholders, review build and all more
clearly defined team dependencies & schedules (aptly updates, etc)	release communication plans	more in person collaboration on the design solution	time for optimization & clean up & maintenance	formal documentation of the design system	more data if raw data
great understanding of analytics and having some clear benchmarks to aim at	more frequent user touch points	increased touch points with users	smaller wins - sounds odd but smaller features releases	mapping & looking at the entire experience	learning more the individual needs for the partners
active v non-active user definition					

LEARNED

companies love us!	need to find creative ways for members to connect	to identify key stakeholders early on	importance of collaboration	we have no shortage of ideas and ambitions	eyeing inter transitions, ideas with important
positivity is powerful	this has so much potential	even a simple form can be very complex to build	the value of the communications we send - emails, push notifications	creating habits is challenging (worthy)	word of mouth important - are more than we think
flexibility is key	build in time - realistic timelines	a better understanding of how members of the greater team view this product	simplicity is a never-ending task	what this means to users	members are excited about how can we to promote

**Optimize how we engage
companies to enroll agents into
MDRT Academy**

— Priority Business Objective for 2020

Two paths to enroll members into MDRT Academy

Individual Memberships

- Market directly to advisors and agents
- Further promote via referrals, word of mouth ,and MDRT members
- Only accounts for 25-30% of current Academy members

Company Partnerships

- Currently, a prominent and profitable path for how they enroll members to their other association, MDRT
- The Academy does not yet have the same prestige or name recognition as MDRT - need to work harder to prove value

2020 UXD Roadmap

Q1

UXD

Content Optimization
R & D

Strategy

2020 Planning
Notifications Strategy
Partner Workshop
Product KPIs

Q2

UXD

Co. Partner Solutions
Enrollment & Payment

Strategy

Pay Portal Research
Notifications Strategy
Tracker Workshop

Q3

UXD

Production Tracker
Connect

Strategy

Connect Workshop
Awareness Workshop
Ideation Workshop

Q4

UXD

Feature Awareness
Content Optimization

Strategy

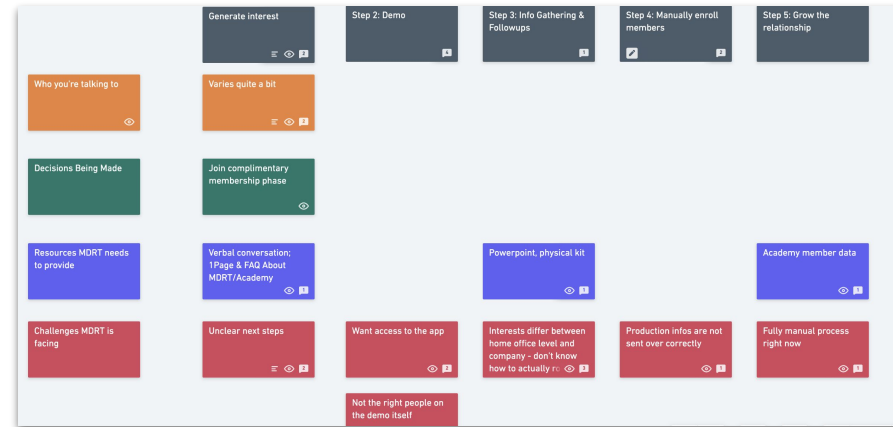
Annual user survey
2021 Planning

Diving deeper into the problem

Uncovering more details about this process and the pain points the MDRT Academy team was experiencing

What was the current process?

1. Generate interest in MDRT Academy, use MDRT contacts
2. Schedule demo to walk through MDRT Academy
3. Series of info gathering & follow up
4. Manually enroll agents
5. Grow the company relationship; compile engagement reports
6. Ultimately sign company partnerships for 2021



Key opportunities to address

- MDRT team was conducting numerous deep-dive demos with companies that were *time-consuming & repetitive*
- Partners *always asked for access into the platform*, but aren't members of the association
- A constant question asked during demos is "*how do we know this is going to help our advisors?*"

Defining the “Company Partner” roles

I ran a proto-persona workshop with the MDRT team to understand the various people they engage with at companies to promote the MDRT Academy

We mapped out **roles & responsibilities, relationship to MDRT, needs from MDRT, concerns they have**, etc.





“Company Partner” roles

Home Office Execs

Often main point of contact for MDRT, responsible for increasing MDRT membership

General Agents

Report to regional director of home office, usually non-producers and managers of other agents.

Home Office Training & Development

Work is geared toward newer agents/advisors, sometimes the Academy can be seen as competition to internal training

Getting the company partner perspective

Conducted 1:1 interviews with company partner contacts to understand their experience with and perception of the MDRT Academy

Who did we talk to?



Debbie, AXA Advisors

Handles advisor communications



Jeff, Countrywide

General Agent, manages several captive agents



Kim, Allstate

Instructional designer



Melissa, Farmer's Insurance

Training & development content creator

Research Questions

Promoting MDRT Academy

How did the company partner's enroll agents?

Were there any pain points?

What have agents' reactions been?

What has engagement looked like?

Perception of value

What do they find most valuable?

Is it worth their time to promote?

How does it compete or supplement their own training materials?

Proof of ROI

What data do companies need in order to sponsor this for their agents?

What does it mean to show that it's working for agents?

What they need to achieve in their roles

- Building a culture of MDRT within their organization
- Increasing team members' individual sales production
- Improve employee retention (often very low in this industry)

What they need from MDRT

- More resources to promote the MDRT Academy
- Hands-on access into the platform
- Better understanding of how agents use it and the benefits in order to promote
- Feel a part of the MDRT Academy experience; especially if they manage agents

Frustrations & concerns

- Competing with so many other things that are on their plate
- Often feel overwhelmed about the right next steps after seeing a demo

**The MDRT contact doesn't
always have a direct relationship
with agents; disconnect for how
to get members enrolled**

— Promoting MDRT Academy

**Promoting MDRT Academy is not
top of mind since they don't have
access to the tool**

— Promoting MDRT Academy

Only vaguely aware of the key benefits and don't know when new features or updates come out

— Promoting MDRT Academy

100% expressed how valuable this was as a free resource to agents; understood it wouldn't be free forever

— Perception of value

Tools & best practices to improve emotional intelligence is a KEY value driver of Academy and a value ADD to internal trainings

— Perception of value

**A competitive advantage exists,
no one could think of other 3P
tools that offer the same level of
high-quality resources**

— Perception of value

**Need to be able to quantify the
impact on agent's performance if
MDRT expects us to pay for
memberships**

— Proof of ROI

Partners need to be able to understand what agents gain by using MDRT Academy in order to promote long-term

— Proof of ROI

Production data is going to be difficult to receive directly from companies; not all agents have production data to start with

— Proof of ROI

Insights Summary

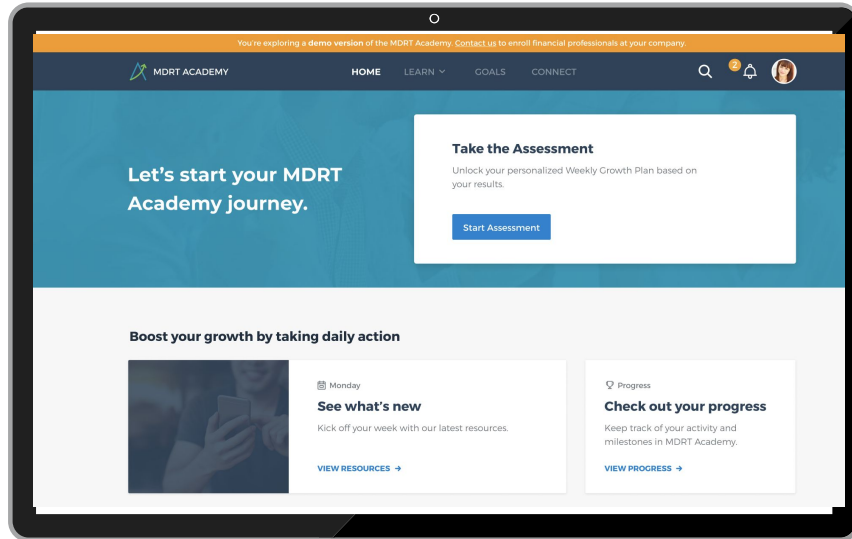
- Companies need **BOTH** a better understanding of what the MDRT Academy is & the benefits it offers AND proof it helps agents excel to support long-term
- MDRT needs to provide more ways to help companies continually promote the Academy to their agents
- Too much time is being spent on demos and company partners leave needing more

Potential solution recommendations

We determined two routes help improve the problems we identified and validated but needed input from our client to determine the next step

Solution #1: Pre-Enrollment

Dedicated demo environment of the MDRT Academy



PROS

- Allow partners to access a version of the Academy at any time
- Help them understand the benefits and features
- Sets us up to provide a mentor experience down the road
- Alleviate the need for a deep-dive feature demo for every intro meeting

CONSIDERATIONS

- MDRT wants to keep the integrity of the member association in tact
- MDRT wants to protect their proprietary data

Solution #2: Post-Enrollment

Member Engagement & Value Report
to send to company partner
stakeholders



PROS

- Alleviate the time it takes to pull engagement reports manually; a current pain point
- Reports could be used evidence when talking to other partners

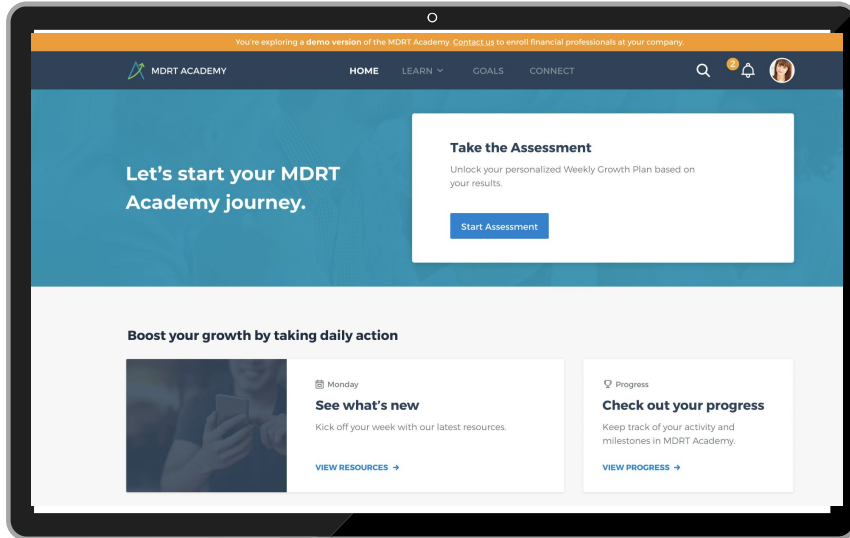
CONSIDERATIONS

- We still need to figure out how we can ultimately prove ROI or that agents are improving
- This solution doesn't help get more agents into Academy, more users would help us get more data

MVP Solution

Solution #1: Pre-Enrollment

Dedicated demo environment of the MDRT Academy



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Sprinting on the solution

How did we approach designing the MVP demo experience?

Feature Job Stories

Company Partners

When accessing MDRT Academy, I want to be able to **understand** the experience better so that I can confidently **recommend** it to my advisors and understand the value it provides.

MDRT Academy team

When company partners access the Academy, **limit** their experience to keep current members' trust and **protect** MDRT's intellectual property.

Design Principle # 1

Ensure MDRT Academy continues to be a safe space for members to learn, grow, and share their experiences.

Design Principle # 2

Empower the user to naturally interact with the experience with (some) limitations.

Design Principle # 3

Maximize the messaging opportunities we have within the experience to communicate the benefits of MDRT Academy.



**Company Partner Demo
Prototype**

Measuring Success

- Demo access → Sponsored enrolled agents
 - Track logins from MDRT Company partner user type
 - Track time spent on site

* Company Partner demo is launching this week (yay!) so we have not started measuring engagement

Questions?