

# WeLearn, Million Dollar Round Table Team Up and Deliver Results

Million Dollar Round Table (MDRT)  
and WeLearn Learning Services

Best Learning Team

January 2022



## Company Background



Company-at-a-Glance	
Headquarters	Park Ridge, IL
Year Founded	1927
Revenue	\$97,000,000
Employees	200
Global Scale (Regions that you operate in or provide services to)	MDRT is a global organization with over 82,000 members in the Americas, EMEA, and the Asia Pacific regions. MDRT supports members’ development through its professional development opportunities, in-person and virtual meetings, publications, and media resources. Additionally, MDRT offers members developmental opportunities, such as book clubs and member-to-member mentoring.
Customers/Output, etc. (Key customers and services offered)	MDRT members are the top performers in the insurance and financial services industry globally. MDRT members come from both independent financial services practices and large global financial services firms, such as NY Life, MetLife, and AIA. MDRT members are required to meet a set level of production (sales) every year to remain a member. Maintaining MDRT membership is considered a mark of accomplishment and excellence in the financial services sector.
Industry	Member Association for Financial Services Professionals
Website	<a href="http://www.mrdt.org">www.mrdt.org</a>

**Company Background**

WELEARN

Company-at-a-Glance	
<b>Headquarters</b>	Chicago, IL
<b>Year Founded</b>	2017
<b>Revenue</b>	Privately held
<b>Employees</b>	20
<b>Global Scale (Regions that you operate in or provide services to)</b>	Support is provided to clients worldwide.
<b>Customers/Output, etc. (Key customers and services offered)</b>	<p>WeLearn is a learning and workforce development company that is focused on building better humans through learning. WeLearn engages clients across all phases of the learning and talent development lifecycle. Learning Program Management, Learning Administration, Custom Content Development, and Workforce Development Solutions are the key categories under which WeLearn organizes its core services.</p> <p>WeLearn’s customers are a cross-section of member-based organizations (associations) and corporations. Customers of WeLearn come from various industries such as health care, financial services, technology, and retail.</p>
<b>Industry</b>	Learning and Development consultancy
<b>Website</b>	<a href="https://www.welearnls.com">https://www.welearnls.com</a>

**Budget and Timeframe**

Budget and Timeframe	
Overall budget	Over \$ 1 million
Number of (HR, Learning, Talent) employees involved with the implementation?	2
Number of Operations or Subject Matter Expert employees involved with the implementation?	5 MDRT employees and has over 30 member volunteers.
Number of contractors involved with implementation	20 contractors
Timeframe to implement	The total implementation timeframe for this initiative is 6 years. Years 1 and 2 (2020 and 2021, respectively) were dedicated to building the MDRT Body of Knowledge and selecting a Learning Management System (LMS) and Learning Design and Development Partner. Years 3 and 4 (2022/2023) will be dedicated to piloting the learning products initially in Singapore and India, followed by Year 5 (2024) that focuses on global rollout.
Start date of the program	The work between WeLearn and MDRT launched in October of 2020.

**Business Conditions and Business Needs**

Founded in 1927, the Million Dollar Round Table (MDRT), is a global independent association of the world's leading life insurance and financial services professionals, representing more than 500 companies and 70 nations and territories.

MDRT was founded by 32 extraordinary life insurance producers, each of whom had placed at least USD \$1 million of life insurance protection into their communities. A forum dedicated to instilling a high-standard, professional approach to life insurance sales and service was envisioned. The concept, "To receive, one must first give," was based on the belief that growth is achieved by exchanging ideas.

It is out of this dream that MDRT emerged, an international, independent association that represents the finest financial services professionals around the world.

With those beginnings, MDRT has grown to over 82,000 members, who must meet production requirements each year to become and maintain membership. Qualifying for membership in MDRT is seen as a milestone in one's professional journey, as it represents a superior level of excellence within the life insurance and financial services industry.

In 2020, the MDRT Executive Committee set a strategic goal for MDRT to be the trusted and preferred professional development resource for its members at all stages of their careers.

MDRT's vision for the fulfillment of this strategic goal was to create a portfolio of learning opportunities based on a member subject matter expert validated Body of Knowledge (BOK) that would highlight career pathways. This portfolio would also facilitate the recognition of achievement through the learning pathway including Assessment-Based Certificates (ABCs), domain-level expertise, and a new, yet to be defined, MDRT Designation.

MDRT's Professional Development Director, Jess Jurasz, engaged with strategy consultant Ellen Moore in early 2019 to develop the project plan, timeline, and preliminary financial model for the program and begin the initial work with a group of MDRT member volunteers to develop a Job Task Analysis (JTA) as a foundation of the Body of Knowledge (BOK), including identifying the technology needs to support this program (Q1 2020). Work on the BOK continued in Q2 and Q3 of 2020 and was validated by focus group calls with a global cadre of MDRT members.

MDRT identified the need for both a learning management system (LMS) and Learning Design and Development Partners to support this initiative and issued two Request for Proposals in Q3 of 2020: one for a learning management system and one for services in Learning Design and Development.

In late Q3 2020, SumTotal was selected as the Learning Management System. WeLearn, meanwhile, was designated as the Learning Design and Development Partner, as well as the head of the new Learning Management System implementation program.

The professional development steering committee (the core learning team) was formed in October of 2020 (Q4 2020) and consists of MDRT's Director of Professional Development, Ellen Moore (MDRT's Strategy Consultant), and WeLearn's Chief Learning Officer. Depending on the specific work to be undertaken, the SteerCo has expanded to include representatives from SumTotal (LMS) and other MDRT functions as needed (Marketing, IT, Member Relations, Strategy).

The partnership with WeLearn and governance structure that has been established with the SteerCo provide MDRT with the resources and knowledge to implement the new MDRT Capabilities Program.

## Overview

MDRT has partnered with WeLearn Learning Services to 1) program manage the implementation of their newly selected Learning Management System (SumTotal), and 2) provide instructional design and development support in support of the creation of a new portfolio of professional development offerings.

WeLearn's recommendation led to the initial phase of the relationship being focused on the implementation of the Learning Management System and the development of an online learning product model for the MDRT Professional Development Program. MDRT had defined a vision for a digitally advanced, mobile-first learning experience, but it had yet to determine what this meant in practice.

In October of 2020, the learning team held a kick-off meeting. Jess Jurasz, Ellen Moore (strategy consultant), and members of the WeLearn team attended the kick-off meeting, including the Chief Learning Officer, Chief Creative Officer, Vice President of Program Management, Vice President of Learning Experience Design, and Director of Assessment Design and Development from WeLearn.

Considering COVID, the kick-off meeting was held virtually over two days. These two days provided the project team with an overview of MDRT, their mission, and objectives, as well as discussions regarding team structure, governance, risks, and issues. Further, specific discussions were held about the following topics: Learning Experience, Learning Product Model/Body of Knowledge (BOK), Assessment and Measurement, and Learning Management System.

During the contracting phase and the kick-off meeting, the following immediate goals were determined for the learning team:

- Milestone 1: Project Planning/Kick-off - This included the development of the high-level project plan, project charter, project communications plan, project risk log, agreement on the project change process, and the Discovery Plan.
- Milestone 2: This comprised of the Learning Management System Strategy, Detailed Project Plan, and Discovery Report.
- Milestone 3: Catalog and Initial Product Model: LMS Catalog Management Strategy (including taxonomy) and initial recommendations for the learning product model.
- Milestone 4: LMS Service Management Strategy and Refined Learning Product Model: LMS Service Management Strategy/Day 1 Readiness Model, Refined Learning Product Model
- Milestone 5: LMS Implementation Complete and Final Learning Product Model: Complete LMS Implementation, finalized learning product model, the revised

cost for learning product build, detailed project plan for product build, development Statement of Work.

According to the scope of work and project kickoff discussions, the work outlined in the milestones was to be completed by February 27, 2021, and it was completed both on time and within budget.

In March of 2021, work began on developing the products for the new professional development portfolio, called the MDRT Capabilities Model. Pilot audiences began working on the new program in March 2022.

### **Learning Approaches**

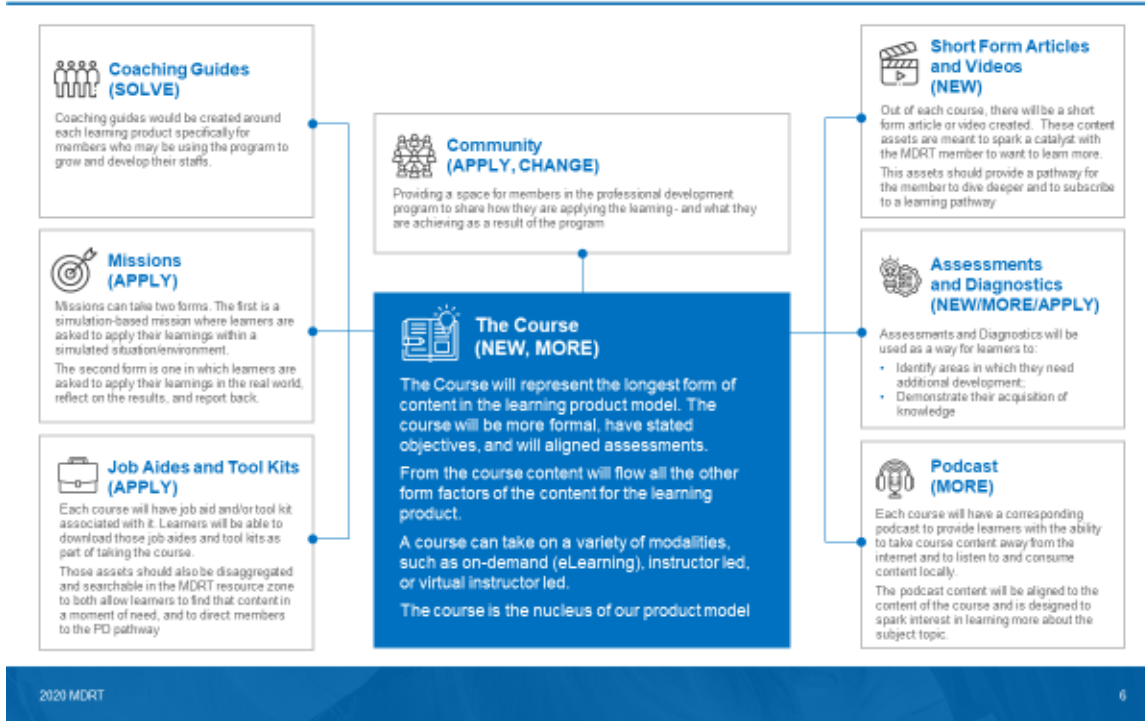
With over 82,000 members in every major geographical region, MDRT has a global presence, with the Asia Pacific region leading membership growth. Prior to this initiative, MDRT's main platform for providing educational and professional development programming was face-to-face meetings which typically attract roughly 15% of the total membership population. MDRT has several digital offerings (blog, podcast, and Learn (content repository)), but prior to this initiative, it did not offer any digital-first professional development opportunities to members. Even though the MDRT Executive Committee (ExCom) determined the overall strategy for this project in 2019, the recent pandemic has reinforced the need for MDRT to provide its members with professional development resources that are digital in nature.

During the phases of the project, WeLearn worked with MDRT stakeholders to better understand the objectives of MDRT for this portfolio of products, as well as the preferences of MDRT members when it came to the use of technology. To develop the learning product model, this understanding was critical.

WeLearn also organized the skills and behaviors identified in the Body of Knowledge (BOK) into learning objectives and courses. As a result, the program comprises of 42 courses that span five domains.

The result of this work was the creation of the following Learning Product Model:

## Our Proposed Learning Product Model



The learning product model served as an articulation of what a professional development learning product would look like for MDRT. To support learners in their moment of learning need, the learning product model has been developed based on the understanding that learners need multiple modes of learning and that over time, learning assets can be disaggregated.

WeLearn's Creative Team created two translated versions of a learning product, one in Traditional Chinese and one in Simplified Chinese, to facilitate MDRT's understanding of the proposed learning product model. The prototypes allow WeLearn and MDRT to gather feedback from MDRT staff and members to validate the learning product model.

MDRT approved the learning product model in February of 2021, and development of the MDRT Capability Program Learning Products was initiated in March of 2021 and will continue through the end of 2022.

## Delivery of Solution

WeLearn provided an overall project management and governance strategy that has allowed the learning team to deliver on the objectives of this initiative.

For the first phase of this project, there were four work teams that were formed that aligned to specific workstreams in the project:

- Steering Committee (SteerCo): Focused on the overall project governance, health, and performance.
- Learning Technologies Team: Focused on the Learning Management System strategy, LMS implementation, LMS Service Management Strategy, and Digital Credentials Platform, Taxonomy, and Implementation
- Learning Product Model Team: Focused on the development of the learning product model.
- Learning Measurement and Assessment Team: Focused on the assessment strategy for the professional development program and the measurement strategy for the overall project.

Each workstream team was composed of individuals from both MDRT and WeLearn. In addition to the core MDRT project team members, additional MDRT staff was engaged for specific workstreams - for example, members of the MDRT IT team were engaged as needed for the LMS implementation, and members of MDRT's marketing team were engaged as it related to the branding of the LMS.

The team and governance structure allowed MDRT and WeLearn to effectively navigate the first phase of this project, implement the SumTotal LMS, and agree on the learning product model.

After the Learning Product Model was approved, MDRT and WeLearn moved into the second phase of the project to create 42 courses across the five domains of the BOK.

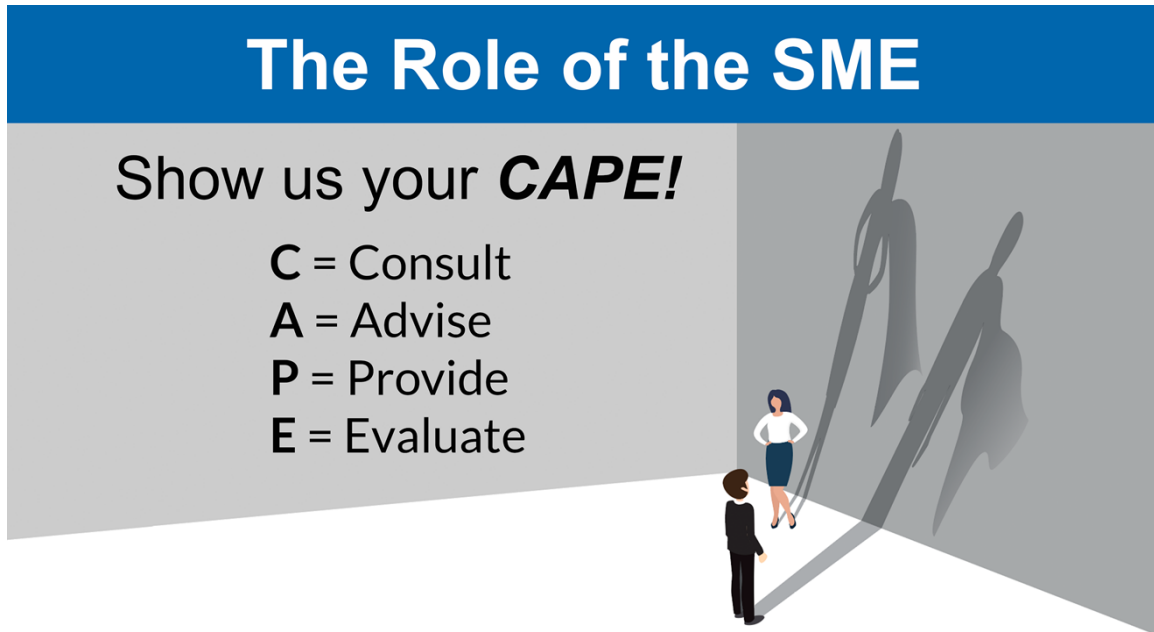
Moving into the development phase, the learning team reorganized into three workstreams:

- SteerCo: focused on overall project strategy, project governance, health and performance.
- Content Design and Development: focused on the development of 42 learning products, associated assets, and assessments.
- Learning Technology Team: focused on the implementation of the learning products, implementation of the assessment item bank, integration of the badging and assessment platform, and build-out of the learner support capability.



The content development team consists of 16 WeLearn staff members and over 30 SMEs from MDRT, with MDRT staff providing final approval on all learning products. The development of the courses has been staged into course blocks, with the first two blocks containing four courses in each, followed by five-course blocks with six courses in each, and a final block with four courses. As a result of this approach, the learning team has been able to scale up the production of learning products and smooth out any unforeseen steps early in the development process.

As MDRT SMEs are busy financial professionals, WeLearn and MDRT carefully designed the role of the SMEs in this project to maximize the learning team's use of the SMEs time. SMEs were considered superheroes by WeLearn and MDRT and were asked to demonstrate their CAPE:



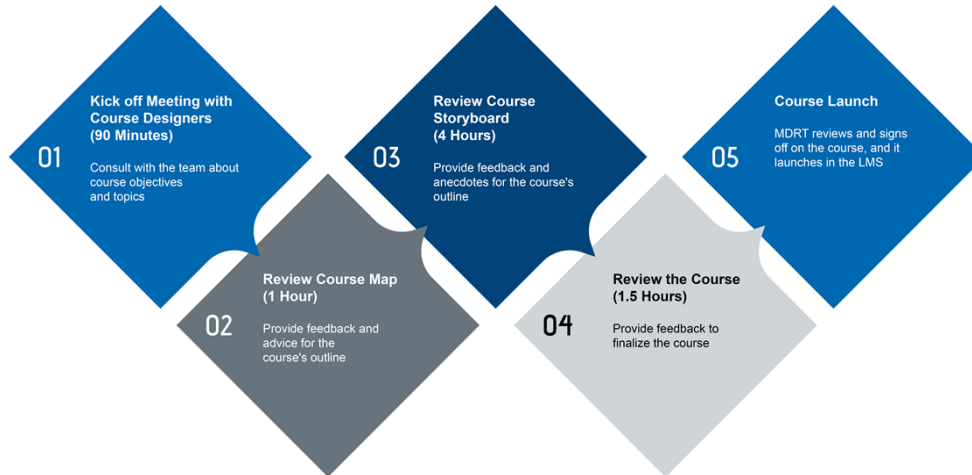
**The Role of the SME**

Show us your **CAPE!**

- C = Consult
- A = Advise
- P = Provide
- E = Evaluate

Using this model for SME involvement, a five-step process for the development of each MDRT Learning Product was developed:

## Proposed role of MDRT Subject Matter Experts in the Development of the Professional Development Learning Products



The five-step process allows WeLearn's course writers and Creative Services team to efficiently work together to develop the course assets envisioned in the learning product model and bring the content to life for MDRT members. MDRT members are storytellers who enjoy sharing their knowledge with their fellow members, and that was very clear in WeLearn's work with the member SMEs. A member SME provided an excellent example of how this translated to the development process in relation to building a lifelong client relationship. This was achieved because he stopped using a business owner's fax machine. SME recorded this as an audio file, and WeLearn converted it into an animated video within the course using SME's voice.

WeLearn and MDRT also explored novel ways of including members of MDRT in the development of the learning products. This was accomplished through the Member to Member podcast. WeLearn has partnered with MDRT to produce a podcast that corresponds with each of the learning products, and in collaboration with an MDRT member serving as the host, they have recorded a range of rich discussions and stories that help to support the learning products and enhance the relationship between MDRT and its members.

As learning products were developed, the team focused on four key areas. In the first area, two additional technology partners were evaluated and selected, one for badging, the other for pre-program assessment. Both cases involved a market scan, identification of two or more providers who might be able to meet requirements of the program, and selection of one provider for each requirement.

The learning technology team also focused on the envisioned end-to-end learning experience and learner journey for this program. With the development and approval of

course content, the learning technology team developed the platform, implemented course content into the learning management system, and identified and mitigated issues with the overall experience to ensure a world-class learning experience for MDRT and its members.

Additionally, the team focused on the development of the learner capabilities for the MDRT Capabilities Program, which aligned learning products in the learning management system to competencies, behaviors, and skills.

This project also entailed the implementation of a multi-tier service management model, setting standard service level agreements, and implementing quality management processes to support any issues reported by members. MDRT Member Relations staff was trained in the use of the multi-tier service management model and the Learning Management System (LMS).

## Measurable Benefits

Over the course of this project, MDRT and WeLearn have demonstrated a track record of delivering results. The initial phases of this project were delivered on schedule and within budget. MDRT and their volunteer community of Subject Matter Experts (SMEs) shared positive early feedback and continued to contribute to the development of new offerings. An independent group of volunteers reviews new learning products (courses) to ensure that the courses are positioned appropriately for a diverse global audience. The SME vision is to create a program that is a game-changer for global members and instills MDRT values in all participants.

MDRT's and WeLearn's mutual focus on governance and project management has allowed the learning team to have an open line of communication to respect each other, understand the project, and recognize the context and benefits of this project within the MDRT organization. As the program is the first of its kind outside of live event programming, the teams have established trust through the diverse and integrated approaches to communicating, which have benefited them and the program outcomes throughout the course of the program. Measures identified for early course review include competency assessment, curated pathways of learning for effective development and mastery while participants learn and earn recognition in the form of Assessment-Based Certificates (ABCs) and Digital Badges.

Phase two of this project continues to meet both the expectations of MDRT and WeLearn regarding both the schedule and the scope of the project. The initial pilot audiences are being recruited and will begin accessing the learning programs in March of 2022. In the original plan, it was intended to introduce at least ten courses; however, the pilot program is being introduced with 13 courses.

During the pilot phase, the learning team will be gathering data from pilot participants that will inform any changes the team will need to make to the learning products prior to the global launch of the program.

According to Jess Jurasz, MDRT's Director of Professional Development, "We are thrilled with the progress we have made with MDRT's Capability Program with the assistance, support, and leadership of WeLearn over the past two years. Every step of the way, WeLearn's team have provided outstanding service and support as we've implemented our strategies. We value and have learned from their prior client experiences and can anticipate a successful program Pilot and introduction for our members."

As a result of this collaboration, MDRT has been able to bring together the capabilities it requires to fulfill the vision set by their Executive Committee when this program was envisioned.

## Overall

The process of building the Capability Program has been a learning experience for both MDRT and WeLearn. MDRT's design and development of digital learning at this scale was a new endeavor. The team experienced several changes during its work on this project, including changes within the team, availability of SMEs, and access to internal technical resources. Despite these challenges, the learning team flexed, and members stepped up and took on these challenges to mitigate the risks to the project timeline.

As MDRT and WeLearn engaged with SumTotal, lessons were learned across the business requirements contracted versus what was needed and the timelines to execute. As MDRT was also undergoing significant digital transformation within its organizational tech stack, the team had to design an end-to-end learning experience without having a clear understanding of the larger tech stack and its connection points to the LMS. Despite those challenges, the project continued with minimal issues and risks requiring mitigation.

To set up MDRT for long-term success, the team has taken a number of initiatives, including developing digital credentials, incorporating additional technologies to complement the end-to-end experience, and aligning the digital experience with the broader MDRT technology stack.

MDRT and its leadership believe a comprehensive program such as the new Capability Program will have lasting impacts on member retention as it supports members who have an annual production requirement to prove and validate their membership. MDRT is firmly convinced that the new Capability Program offering will be a valuable, sustainable benefit that reinforces the MDRT culture.

Finally, it is planned, post-pilot, that the team collaboration will translate and localize the curriculum into initially six key priority languages, including Chinese Simplified and Traditional, Japanese, Korean, Thai, and Spanish.

## About Brandon Hall Group

With more than 10,000 clients globally and 29 years of delivering world-class research and advisory services, Brandon Hall Group is focused on developing research that drives performance in emerging and large organizations, and provides strategic insights for executives and practitioners responsible for growth and business results.



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recognizes world-class HCM programs that transform their organization and achieve breakthrough results. This designation is the next step beyond the HCM Excellence Awards, which focus on a single program, and looks at the department as a whole.

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