



# 21 UPDATE

CONNECTIONS THAT COUNT

NAIFA is pleased and excited to announce the following Strategic Initiatives that have been implemented pursuant to the NAIFA 21 Strategic Plan, in an effort to enhance the member value proposition by protecting and improving your bottom line. This update will provide brief snapshots of our progress with the NAIFA 21 Strategic Plan toward the realization of the vision and imperatives of transitioning NAIFA into the 21<sup>st</sup> Century. The person with chief responsibility for NAIFA 21 implementation is the Deputy CEO, Susan B. Waters, EDM, CAE. Reach Dr. Waters at [swaters@naifa.org](mailto:swaters@naifa.org) or 703-770-8102.

To comment on any of these snapshots, visit the NAIFA 21 blog at <http://naifa.typepad.com/naifa21update>.

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## ADVOCACY: NAIFA GOV. ELECTRONIC COMMUNICATIONS

**Strategy/Tactic:** The Government Relations communications program has been revamped to the new NAIFA Gov. series of electronic communications that are named in a manner to signal the urgency of the communication and are color-coded to aid in identification of the communication. GovTalk is blue, and is informational. GovWatch is green, and signifies information that may have a financial impact on members. GovAlert is red and means that immediate attention and action is required. In addition, there will be GovCast for media presentations and GovPod for podcasts.

**Value/Benefit:** NAIFA leaders, including state and local association presidents and executives, have complained both that they don't get enough information about government issues and NAIFA's advocacy efforts, and that they get too many emails from NAIFA. This system will allow the recipients to see the types of communications arriving from the NAIFA Government Relations department, and decide when to read them. Hopefully, the red in GovAlert will cause the NAIFA leaders to stop and take the requested action.

**When:** The new communications system went into effect on January 1, 2008.

For more information or to join the conversation, contact:

[wanderson@naifa.org](mailto:wanderson@naifa.org) – William Anderson, Sr. VP, Law and Government Relations, NAIFA

## ADVOCACY: NAIFA PARTNERS FOR ADVOCACY

**Strategy/Tactic:** NAIFA Partners for Advocacy was launched to allow Corporate non-managerial employees of home offices and broker-dealers and non-producing agency employees and support staff to participate in and contribute to NAIFA's advocacy efforts. By paying an annual fee of \$50, those who participate will receive communications from the Government Relations department (described above), email updates on new articles on the *Advisor Today* website and additional email communications on federal issues.

**Value/Benefit:** NAIFA Partners for Advocacy will play a crucial role in influencing issues that are critical to our industry. This allows greater participation in the public policy and advocacy programs of NAIFA.

**When:** NAIFA Partners for Advocacy was launched on November 30, 2007.

For more information or to join the conversation, contact:

[ywashingtonbrown@naifa.org](mailto:ywashingtonbrown@naifa.org) – Yasemin Washington Brown, VP Membership Marketing and Association Services, NAIFA

[wanderson@naifa.org](mailto:wanderson@naifa.org) – William Anderson, Senior VP, Law and Government Relations, NAIFA

## ADVOCACY: NEW TAX EXPERT

**Strategy/Tactic:** NAIFA has retained Danae (Dani) M. Kehoe, Esq. to represent our members and the industry on federal government legislative issues, focusing primarily on emerging federal tax law affecting life insurance and related products. Dani is a well-known and respected lobbyist and tax expert in Washington, and is a former NAIFA employee, known also to many of our members and leaders.

**Value/Benefit:** This is an example of how the new NAIFA 21 is expanding NAIFA's ability to represent our members, the industry and the clients of our members. Dani's addition to our government relations team deepens our reach and broadens our ability to be sure we are heard on Capitol Hill.

**When:** December 2007.

For more information or to join the conversation, contact:

[wanderson@naifa.org](mailto:wanderson@naifa.org) – William Anderson, Senior VP, Law and Government Relations, NAIFA

## EDUCATION & SALES TRAINING: NEW NAIFA/THE AMERICAN COLLEGE CONTRACT

**Strategy/Tactic:** A new contract between NAIFA and The American College (TAC) has been signed.

**Value/Benefit:** The new agreement provides for improved customer service from The American College, preserves the NAIFA membership requirement for LUTCF and FSS, and provides royalty income to NAIFA and the state and local associations. Moderator fees for larger classes are significantly increased.

**When:** The agreement is effective on January 1, 2008.

For more information or to join the conversation, contact:

[sblodgett@naifa.org](mailto:sblodgett@naifa.org) – Samantha Blodgett, Director, Member Benefits and Educational Programs, NAIFA

[mgerber@naifa.org](mailto:mgerber@naifa.org) – Michael Gerber, VP and General Counsel, NAIFA

[daniel.reider@theamericancollege.edu](mailto:daniel.reider@theamericancollege.edu) – Dan Reider, LUTC Manager, TAC

## COMMUNICATIONS: ADVISOR TODAY RE-ENGINEERING

**Strategy/Tactic:** Advisor Today (AT) is being re-engineered with an eye to making the content more interesting and “edgier,” to increase the identification of the magazine to NAIFA, and to become more cost effective through savings and increases in ad revenues.

**Value/Benefit:** The magazine is the only contact that many members have with NAIFA on an ongoing basis. Improving its content and re-branding it to NAIFA will increase the value of membership. An Editorial Advisory Council will be assembled to give advice about issues of interest to NAIFA members and to provide continuous feedback on the editorial content of AT.

**When:** Cost savings should be realized beginning with the January issue, improving the financial picture. The increased identification with NAIFA should also be apparent by January, and content changes will begin by the second quarter of 2008.

For more information or to join the conversation, contact:

[amseka@naifa.org](mailto:amseka@naifa.org) – Ayo Mseka, Editor-in-Chief, NAIFA

[jboyle@naifa.org](mailto:jboyle@naifa.org) – John Boyle, Assistant VP – Sales and Meetings, NAIFA

[jhealy@naifa.org](mailto:jhealy@naifa.org) – John J. Healy, CAE, President, NAIFA Service Corporation

[swaters@naifa.org](mailto:swaters@naifa.org) – Susan B. Waters, EDM, CAE, Deputy CEO, NAIFA

## COMMUNICATIONS: SEARCHABLE STAFF DATABASE

**Strategy/Tactic:** A searchable database of NAIFA staff will be added to the members’ only content of the NAIFA website. Members may locate staff members by name, by department, or by function and will see their name, phone number and email address.

**Value/Benefit:** Members will be more likely to contact the staff person they seek on their first try, mitigating the potential for multiple call transfers. This increases the transparency within NAIFA as we try to enhance accessibility for our members.

**When:** This will be available by January 10, 2008.

For more information or to join the conversation contact:

[vdobbin@naifa.org](mailto:vdobbin@naifa.org) – Vicky Dobbin, Director of Communications, NAIFA

[swaters@naifa.org](mailto:swaters@naifa.org) – Susan B. Waters, EDM, CAE, Deputy CEO, NAIFA

## COMMUNICATIONS: FREE LOGO REDESIGN

**Strategy/Tactic:** NAIFA has offered to redesign the logo for any state or local association at no cost to the local association.

**Value/Benefit:** This is a service to the state and local associations, and improves the NAIFA branding efforts by promoting a consistent look for NAIFA and the state and local associations. To date, more than 50 associations have taken advantage of this offer.

**When:** Ongoing, beginning in December 2007.

For more information or to join the conversation, contact:

[vdobbin@naifa.org](mailto:vdobbin@naifa.org) – Vicky Dobbin, Director of Communications, NAIFA

## **MEMBERSHIP MARKETING: NORTHWESTERN MUTUAL FINANCIAL NETWORK**

**Strategy/Tactic:** Northwestern Mutual Financial Network launched a program to pay NAIFA national dues for agencies that achieve 90% (or higher) levels of membership in NAIFA. A member recruitment program is being developed by the Membership Department.

**Value/Benefit:** The Northwestern Mutual program is being promoted through a press release and advertising as well as by John Healy in meetings with CEOs of other insurance companies. This could result in an increase of several thousand NAIFA members.

**When:** The Northwest Mutual program is in process. The member recruitment program will be established by the board.

For more information or to join the conversation, contact:

[ywashingtonbrown@naifa.org](mailto:ywashingtonbrown@naifa.org) – Yasemin Washington Brown, VP – Membership Marketing and Association Services, NAIFA

[ameyerson@naifa.org](mailto:ameyerson@naifa.org) – Anne Meyerson, Director, Corporate Outreach, NAIFA

## **NETWORKING: LISTEN 'N LEARN TOURS**

**Strategy/Tactic:** John Healy's Listen 'N Learn tours and Board member appearances are creating networking opportunities for NAIFA members. The local and state association meetings are a wonderful opportunity for members to get to know each other, establish relationships that can last for a lifetime and be a source of referral business.

**Value/Benefit:** Increased contact with NAIFA representatives is important to establish that the new NAIFA has arrived and is establishing a culture of greater responsiveness to members. Member-to-member relationships are the connections that count.

**When:** Under way now.

For more information or to join the conversation, contact:

[jhealy@naifa.org](mailto:jhealy@naifa.org) – John J. Healy, CAE, CEO, NAIFA

[jellis@naifa.org](mailto:jellis@naifa.org) – Jennifer Ellis, Executive Administrator, NAIFA

## **GOVERNANCE: DUES ALLOCATION**

**Strategy/Tactic:** The Finance Committee and Board of Trustees are considering allocation of the dues increase dollars to implementation of NAIFA 21. At the January Board meeting, the Board will be asked to set priorities among the NAIFA 21 initiatives, so

that as the funds are received, the most important and urgent programs will be implemented first.

**Value/Benefit:** Establishing priorities will allow us to implement those programs that will have most impact on members first. This should propel membership recruiting, marketing and the growth of the new NAIFA.

**When:** Programs are ongoing, but the result of the Board priority setting will be communicated throughout the NAIFA organization after the January meeting and committees and professional staff will be asked to consider those priorities as they plan their work for the rest of the year and beyond.

For more information or to join the conversation, contact:

[jtaggart@taggartcompany.com](mailto:jtaggart@taggartcompany.com) – Jeffrey J. Taggart, CLU, ChFC, LUTCF, President, NAIFA

[tcurrey@sbcglobal.net](mailto:tcurrey@sbcglobal.net) – Thomas D. Currey, CLU, ChFC, Secretary, NAIFA

[jhealy@naifa.org](mailto:jhealy@naifa.org) – John J. Healy, CAE, CEO, NAIFA

[swaters@naifa.org](mailto:swaters@naifa.org) – Susan B. Waters, EDM, CAE, Deputy CEO, NAIFA