

On the Spot

Your main source on what's going on in MLR!

MARCH/APRIL 2013 - ISSUE 3

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Workplace Benefits Generates Persistency Revenue For MLR



In 2012, MLR completed the enrollment of Trustmark's ULE and DI products at the City of Waterbury and Waterbury BOE in Connecticut. The initial sale, the implementation and enrollment, and the ongoing account management of this case exemplifies the power of Workplace Initiatives, the partnership among our distribution channels and a client-centric approach to sales and service. It is working out to be one of our most successful cases to date and the revenue keeps coming in.

With almost 3,500 eligible employees, our team of four MLR FSRs and four MetLife Barnum FSRs were able to meet face-to-face with 2,200 employees at their worksite, and they enrolled 1,600 in life and disability benefits.

In addition to the FYGDC that has been generated from this sale, MLR recently received a \$24,700 persistency (93.5%) bonus from the city employees enrollment and we are expecting a similar bonus later this year from the BOE employees enrollment.

There are a number of other cases in addition to Waterbury in which MLR is receiving persistency revenue from Trustmark. For the 12 months ending June 2013, MLR should generate more than \$100,000 of persistency revenue.



The City of Waterbury, CT (Photos: www.waterburyct.org)

A Message from Derrick



We produce what we continually keep in front of us. If you focus on an image of success in your mind, you're going to move toward success. If you see yourself as barely getting by, your marriage getting worse, your health going downhill, or you are just going through the motions at work, then most likely your life will gravitate toward those negative situations.

Your vision — what you see — has a tremendous impact in your life. We need to quit allowing our imaginations to keep us beaten down. Instead, let's start allowing our imaginations to build us up. In other words, keep the goals you want to see come to pass in front of you. That image will set the limits for your life.

A stylized, handwritten signature in black ink, appearing to read "Derrick D." with a large, sweeping flourish at the end.

The Power of A Team Approach

MLR has been a DC plan provider for South Carolina ORP for over ten years servicing over 5,000 participants. Ted Franks (Regional Managing Director), Mike Leonard and Jim Diemer (FSRs), and Ray Abbruzzese (Account Executive) teamed up with PlanSmart Account Executive Derrick Johnson to formulate a plan on the best approach for providing participants with holistic financial education and guidance.

The team worked together to come up with a plan to showcase the comprehensive retiree education series at the Medical University of South Carolina. We are confident that the success of this first SC ORP provider education series will open the door for the Workplace Initiatives team to deliver their services throughout South Carolina Healthcare Systems and K-12 Education districts as well.

The new organization structure is providing the MLR Sales Team with a great opportunity to partner together, whether it be on PlanSmart, Business Advantage, Workplace Benefits and so much more.

"The opportunity to partner with the Workplace Initiatives team members brings the added value of existing relationships to each of us," said Derrick Johnson. "Together, our ultimate goal is to be the bar of excellence in terms of financial education and wellness across South Carolina and the entire Southeast region. As a group, we have so much expertise and value to bring to our clients."

It is an exciting time at Workplace Initiatives as we begin to understand and take advantage of the talent within our teams.

MARK YOUR CALENDARS!

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Save the date for these important upcoming events:

- **Colorado ASBO Conference:** Barry Eller's team will exhibit in Broomfield, CO April 10-12, 2013.
- **Ohio ASBO Conference:** Bill Ahonen's team will exhibit in Columbus, OH April 23-26, 2013.
- **Connecticut ASBO Vendor Day:** Sean Belile's team will exhibit in Southington, CT on April 25, 2013.
- **MLR Consultant Forum 2013:** May 1-3, 2013 in Chicago, IL
- **Indiana ASBO Conference:** Lance Ference will exhibit in Ft. Wayne, IN on May 8-10, 2013.



KUDOS KORNER

CONGRATULATIONS for the following achievements:

- The ID channel received the Gold Brandon Hall Award for the "Best Learning Team" in recognition of the PlanSmart Training Series.
- **Dennis Nelson** celebrated his 25-year anniversary with MetLife on March 30th.
- **Sheila Henderson** celebrated her 5-year anniversary with MetLife on March 31st.
- **Pat Pettorsson** celebrated her 5-year anniversary with MetLife on February 19th.
- **Susan Fenmore** passed her Series 26 licensing exam.
- **Jen Geremia** has been selected as the 2012 Account Executive of the Year!



HAVE YOU HEARD?

Mike Fischer joins the Unassigned Account Management Team from USI Consulting Group in New York. Mike has over 10 years experience in the DC industry. His varied duties have included client service, internal wholesaling, marketing and product development. Mike lives in Central NJ with his wife, three children & a Shih Tzu. He enjoys shooting hoops, bike riding, golf, cheering for the Mets & Devils and having fun with his family.

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