DMAW

Direct Marketing Association of **Washington**

LIST BAZAAR

MAY 12, 2022

The Legend returns...

Session

Back to Basics:
Rebuilding the List Broker/List Manager Relationship After COVID

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BACK TO BASICS: REBUILDING THE BROKER/MANAGER RELATIONSHIP

ARLENE BAUM – CONRAD DIRECT INC.

MAIA WORDEN – CONRAD DIRECT INC.

WHAT'S A BROKER?
WHAT'S A MANAGER?

And what's a broker/manager?

BROKER TASKS (SOME)

Client Facing	Internal/Background
Gather Information	Document Client Facing activities
Recommend	Order Processing Related
Deliver Data	Communicate with internal teams
Assess Performance	Manage tasks x Clients
Provide related information	Other duties

MANAGER TASKS (SOME)

Client/Outside Facing	Internal/Background
Manage outside use of List (s)	Process & track Orders
Provide information to Brokers	Document
Deliver Data	Order Processing Related
Assess & Report performance/sales/use	Communicate with internal teams
	Manage tasks x Clients
	Other duties

BROKER - MANAGER

BROKER & MANAGER TASKS

Gather Information

Recommend

Deliver Data

Assess Performance

Provide related information

Document Client Facing activities

Order Processing Related

Communicate with internal teams

Manage tasks x Clients

Other duties

Manage outside use of List (s)

Provide information to Brokers

Deliver Data

Assess & Report performance/sales/use

x Clients =

ORGANIZED INTERPRETER

FOLDERS/ CALENDAR

TIME MANAGEMENT APPS

READING

UNDERSTANDING

TEAM SUPPORT

AND SIMILAR INTERACTIONS WITH/BY

- Representatives of data-owner(s)
- Data Owners
- Co-op and Model platforms and databases

DATABASE/CO-OP/MODELERS ARE **PART OF THIS** TOO!

ACQUISITION –CLIENT TO PARTNERS

AGENCY & LIST CO

LIST PLANNING

RESEARCH

RENTAL REVENUE

EXCHANGE REPAYMENT

FILE UPDATES/ENHANCEMENTS

PROMOTION TO OUTSIDE USERS

SB/DATA HOUSE

RENTAL/EXCHANGE FILES

MERGE/DP

ENHANCEMENTS

CAGE

CO-OP/MODELERS

DATA INTAKE, ANALYSIS AND MODEL CREATION

REPORTING

RECOMMEND & PROVIDE DATA FOR PLANS

BROKER - MANAGER

BROKER & MANAGER TASKS

Gather Information

Recommend

Deliver Data

Assess Performance

Provide related information

Document Client Facing activities

Order Processing Related

Communicate with internal teams

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ORGANIZED INTERPRETER

FOLDERS/ CALENDAR

TIME MANAGEMENT APPS

READING

UNDERSTANDING

TEAM SUPPORT

MULTIPLY YOUR TASKS
BY COLLEAGUES
AT OTHER COMPANIES
DOING SIMILAR THINGS FOR THEIR CLIENTS

… just a LITTLE differently

HOW DIFFERENTLY?

- No phone call
- No preclearance
- No contact name
- No phone number
- No person

WHY?

AUTOMATION

- Efficient
- Fast
- High Volume
- 24/7

DOES IT MATTER?

AUTOMATION

- Efficient
- Fast
- High Volume
- 24/7

PERSON-TO-PERSON

- Engage
- Ask
- Knowledge
- Share

TASKS & EXECUTION BECAME TRANSACTIONAL

WHAT HAPPENS TO THE IDEAS?

HOW DO YOU FEEL IF YOU ARE IN RED LETTERS?

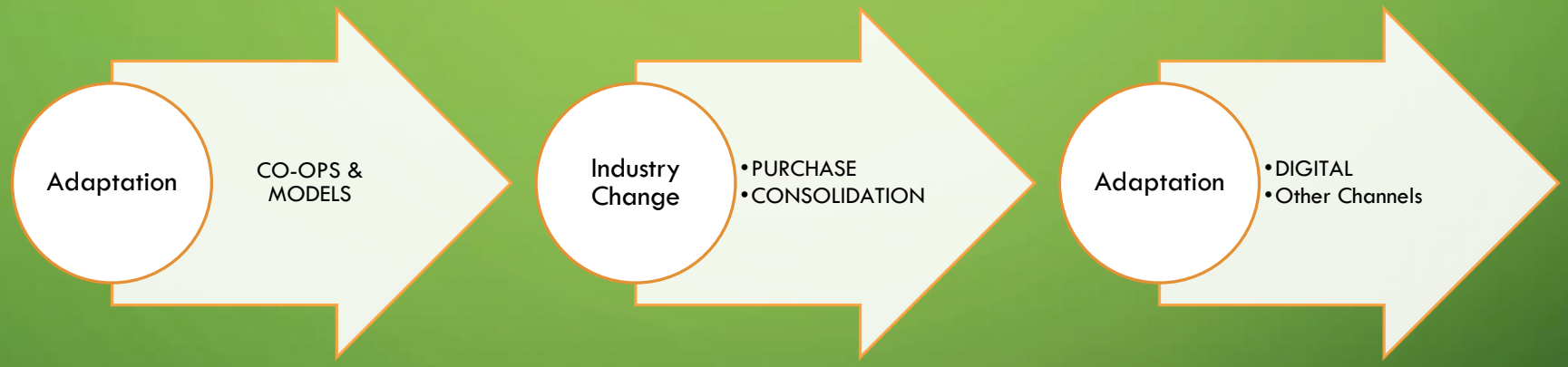
BROKER/LIST/DATA COMPANY = ORDER TAKER

MANAGER/DATABASE/CO-OP = DATA PROVIDER

AGENCY = PLANNER

PLANNING = VOLUME REPLACEMENT STRATEGY

LIST PROMOTION = REVENUE FORECASTING


Adaptation
CO-OPS & MODELS
Industry Change
•PURCHASE
•CONSOLIDATION
Adaptation
•DIGITAL
•Other Channels

PRIMARY OBJECTIVE?

MATCH USERS with BEST DATA and/or PLATFORMS

WHO IS COMMUNICATING WHAT TO WHOM & WHY?

HOW IS IT WORKING?

REMOTE WORK = NORMAL

NEW TASK AT YOUR COMPANY THAT COULD BE UNIVERSAL?

REMOTE WORK = NORMAL

NEW ACCOUNT RELATED TASK AT ANOTHER COMPANY YOU WANT TO DO AT YOUR COMPANY??

REMOTE WORK = NORMAL

WHAT DO YOU “MOST” MISS FROM IN PERSON/IN OFFICE WORK ENVIRONMENT?

YOU = BROKER

WHAT IS #1 PANDEMIC RELATED CHALLENGE YOU HAVE WITH MANAGERS?

YOU = MANAGER

WHAT IS #1 PANDEMIC RELATED CHALLENGE YOU HAVE WITH BROKERS?

CO-OP/MODEL ACCT PERSON

IS A BROKER OR A MANAGER?

WHY OR WHY NOT?

YOU FIND DATA TO USE; WHAT'S A VALUE-ADDED RESPONSE TO AN INQUIRY FOR COUNTS & USAGE ?

Why?

CLIENT IS MISSING 1 LIST FOR MERGE. WHAT ARE THE NEXT STEPS FOR YOU IF THIS PROBLEM CAN'T BE DELEGATED?

YOU RENT DATA TO USERS; MOST USEFUL REPLY TO "WHO IS YOUR MAILER?" INCLUDES…

Why?

LIST-OWNER ASKS FOR RESULTS ON THEIR LIST FOR MAILER XXX.

WHAT DISCUSSION CAN YOU HAVE IN YOUR ROLE?

Why?

COMMUNICATION WITH AN OUTSIDE COLLEAGUE OR COMPANY MAY BE AN ISSUE.

WHAT IS THE NEXT STEP FOR YOU?

Who here today can help?

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THANK YOU!