



# LIST BAZAAR

MAY 12, 2022

The Legend returns...

# Session

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

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Director of Client Services, Conrad Direct

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Director of Client Services, Conrad Direct



# BACK TO BASICS: REBUILDING THE BROKER/MANAGER RELATIONSHIP

ARLENE BAUM – CONRAD DIRECT INC.

MAIA WORDEN – CONRAD DIRECT INC.

The background is a solid green color with a subtle gradient. In the four corners, there are decorative white line-art patterns resembling circuit boards or neural networks, with lines connecting to small circles.

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

*And what's a broker/manager?*

# BROKER TASKS (SOME)

## Client Facing

Gather Information

Recommend

Deliver Data

Assess Performance

Provide related information

## Internal/Background

Document Client Facing activities

Order Processing Related

Communicate with internal teams

Manage tasks x Clients

Other duties

# MANAGER TASKS (SOME)

## Client/Outside Facing

- Manage outside use of List (s)
- Provide information to Brokers
- Deliver Data
- Assess & Report performance/sales/use

## Internal/Background

- Process & track Orders
- Document
- Order Processing Related
- 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  
Manage tasks x Clients  
Other duties  
Manage outside use of List (s)  
Provide information to Brokers  
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Assess & Report performance/sales/use

x Clients =

## ORGANIZED INTERPRETER

FOLDERS/ CALENDAR

TIME MANAGEMENT APPS

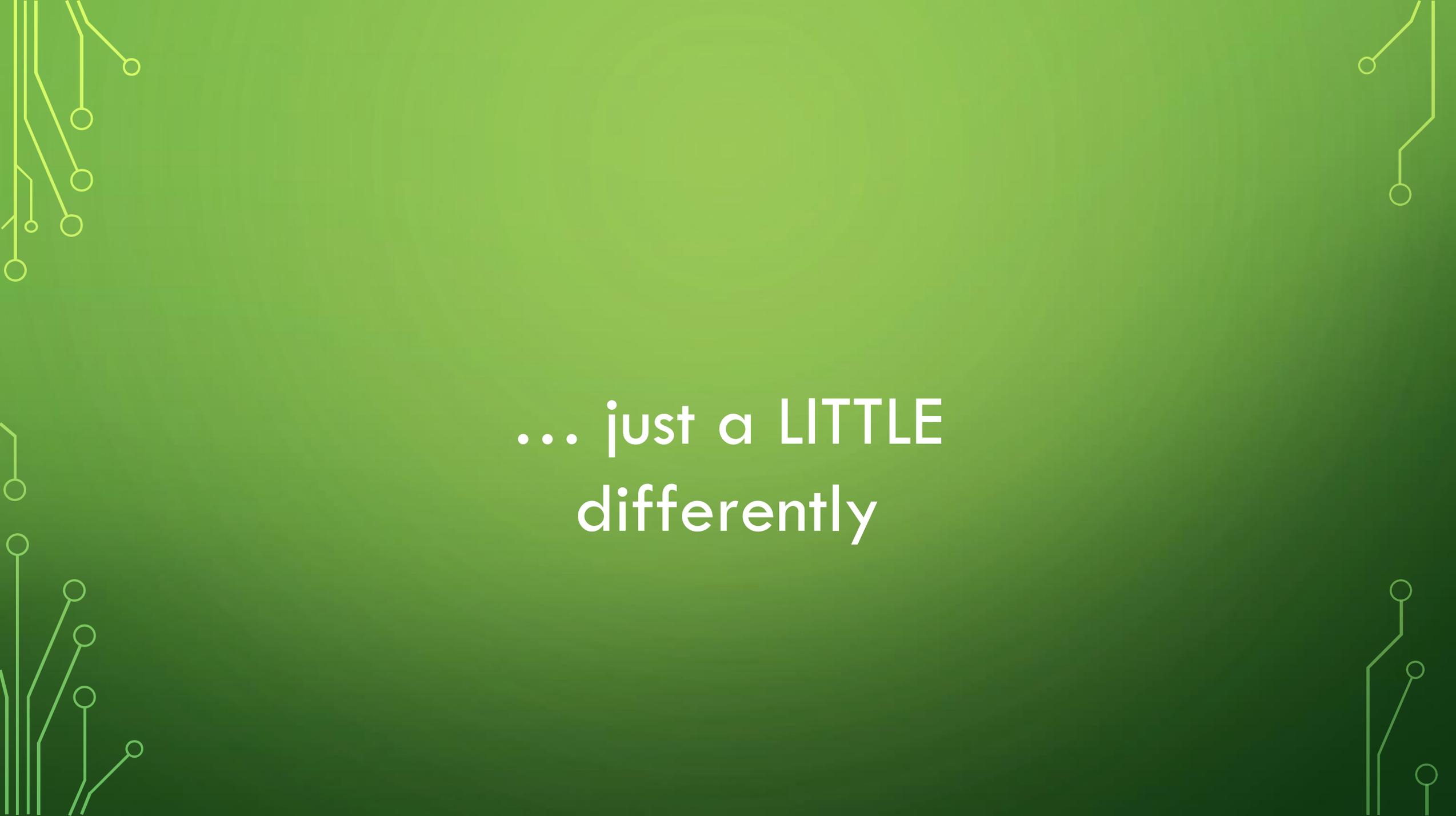
READING

UNDERSTANDING

TEAM SUPPORT

The image features a dark green background with a subtle gradient. In the four corners, there are decorative elements consisting of light green lines that resemble circuit traces or a network diagram, ending in small circles. The text is centered in a clean, white, sans-serif font.

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

The background is a solid green color with a subtle gradient. In the four corners, there are decorative white line-art patterns that resemble circuit traces or neural network connections. These patterns consist of straight lines of varying lengths and angles, ending in small white circles. The patterns are most dense in the bottom-left and top-left corners, and more sparse in the top-right and bottom-right corners.

... 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

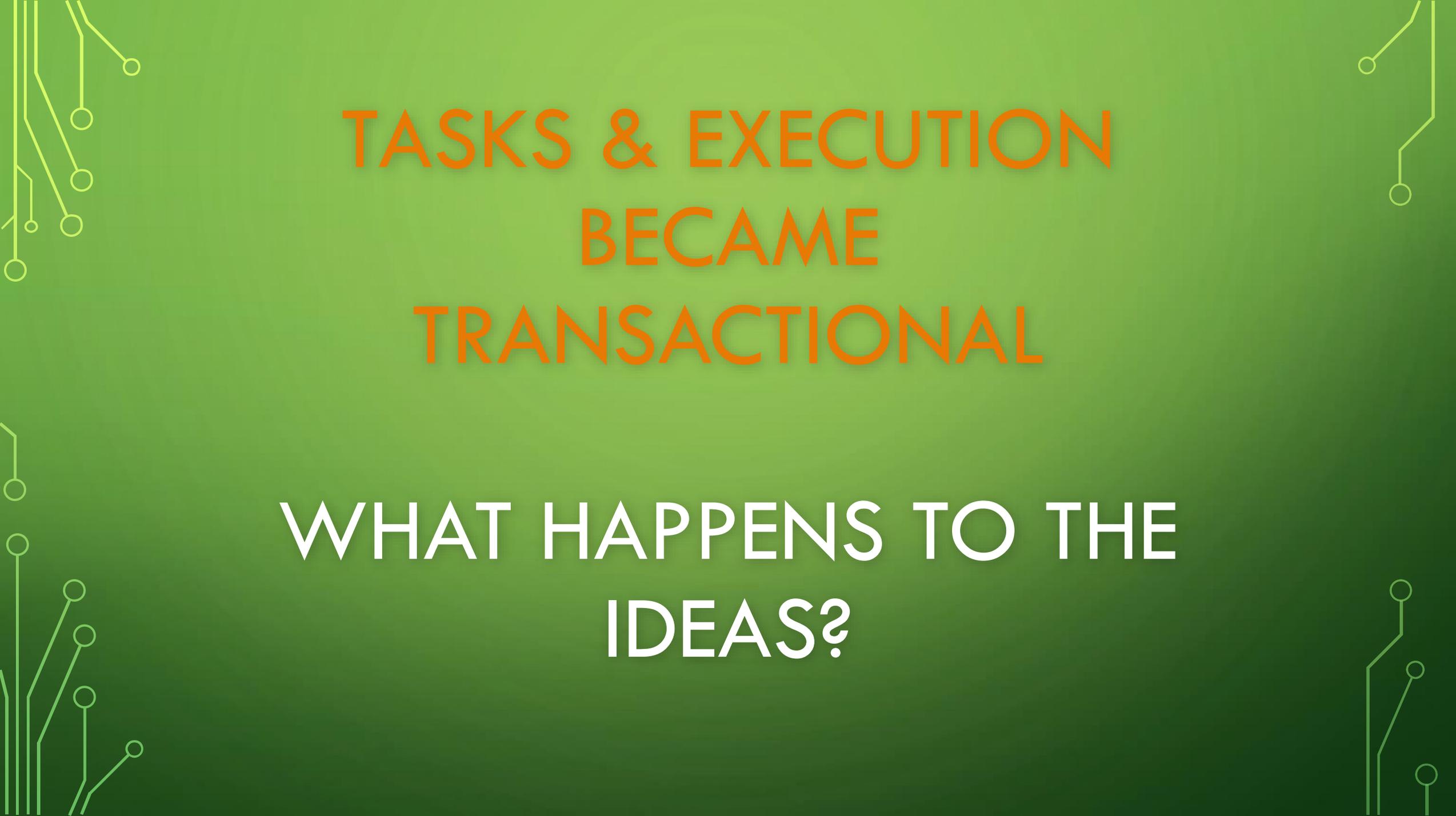
# DOES IT MATTER?

## AUTOMATION

- Efficient
- Fast
- High Volume
- 24/7

## PERSON-TO-PERSON

- Engage
- Ask
- Knowledge
- Share

The background is a dark green gradient. In the corners, there are decorative white and light green circuit-like lines with small circles at the ends, resembling a PCB layout.

# TASKS & EXECUTION BECAME TRANSACTIONAL

## WHAT HAPPENS TO THE IDEAS?

# HOW DO YOU FEEL IF YOU ARE IN **RED LETTERS**?

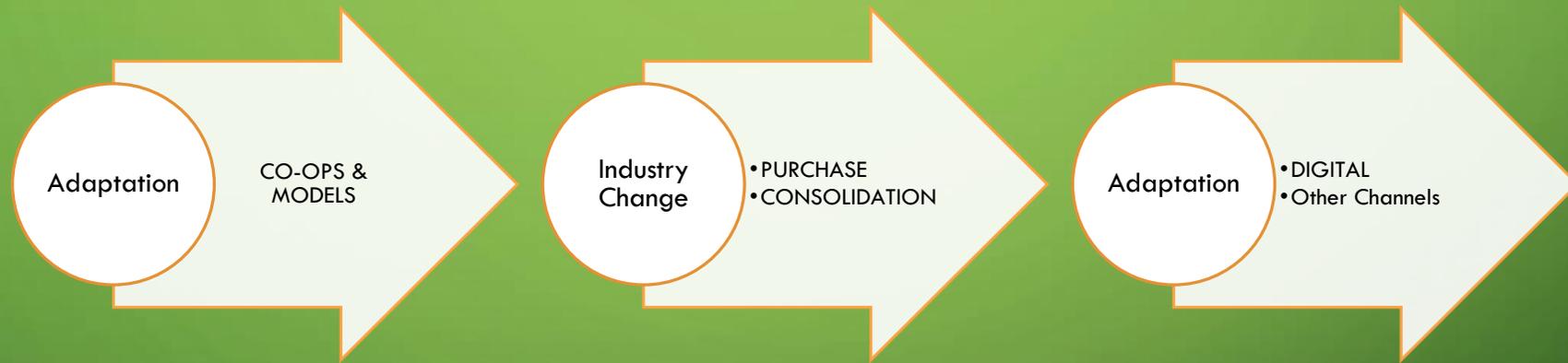
**BROKER/LIST/DATA COMPANY** = ORDER TAKER

**MANAGER/DATABASE/CO-OP** = DATA PROVIDER

**AGENCY** = PLANNER

**PLANNING** = VOLUME REPLACEMENT STRATEGY

**LIST PROMOTION** = REVENUE FORECASTING



The background is a dark green gradient. In the four corners, there are decorative white circuit-like patterns consisting of lines and small circles, resembling a PCB or a network diagram.

PRIMARY OBJECTIVE?

**MATCH USERS with BEST DATA  
and/or PLATFORMS**

The background is a solid green color. In the four corners, there are decorative white line-art patterns resembling circuit traces or neural network connections. These patterns consist of straight lines of varying lengths and angles, ending in small white circles.

WHO IS COMMUNICATING WHAT TO WHOM &  
WHY?

HOW IS IT WORKING?



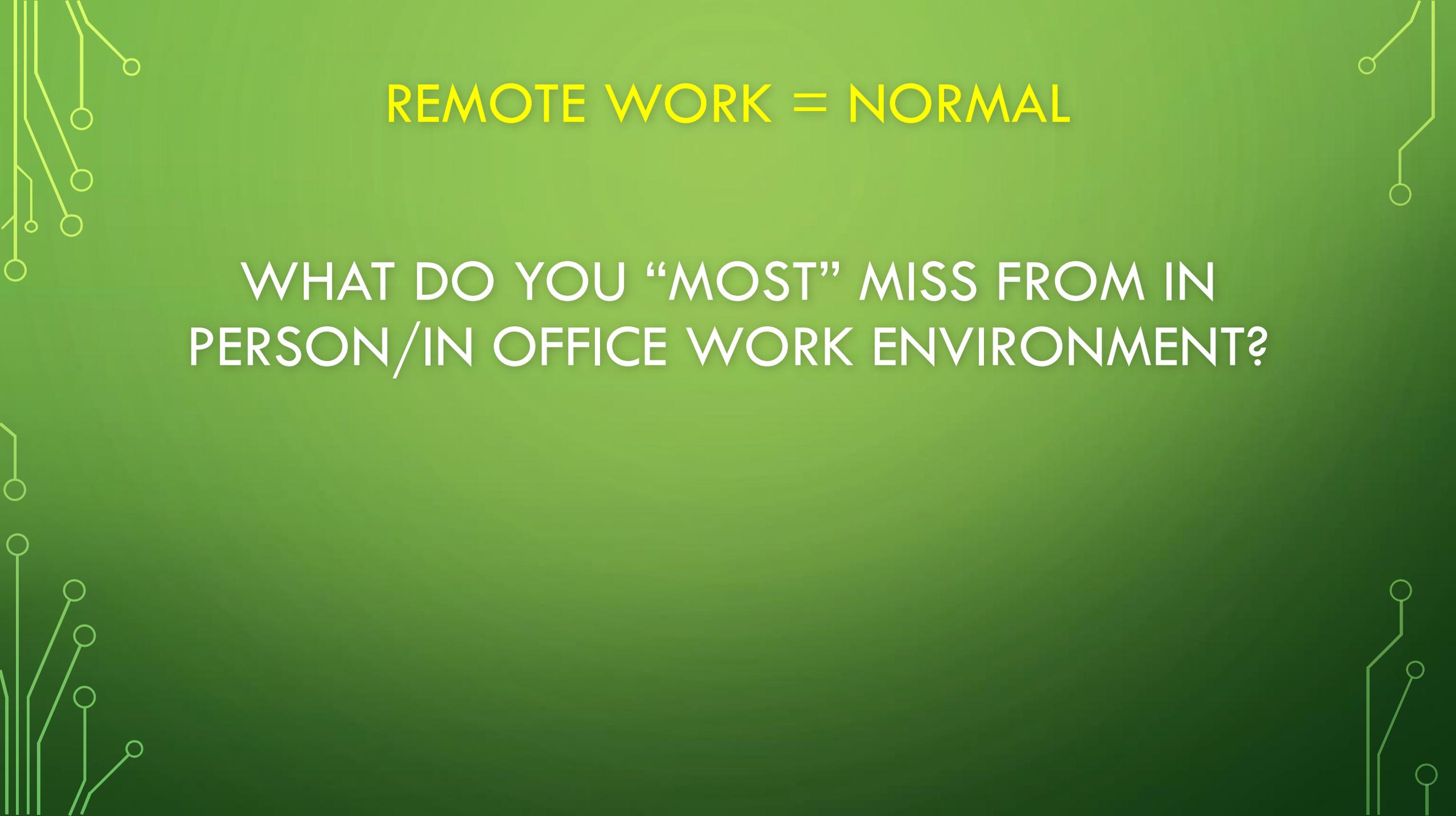
The background is a dark green gradient. In the corners, there are decorative white and light green circuit-like patterns consisting of lines and small circles, resembling a network or data flow diagram.

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??

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REMOTE WORK = NORMAL

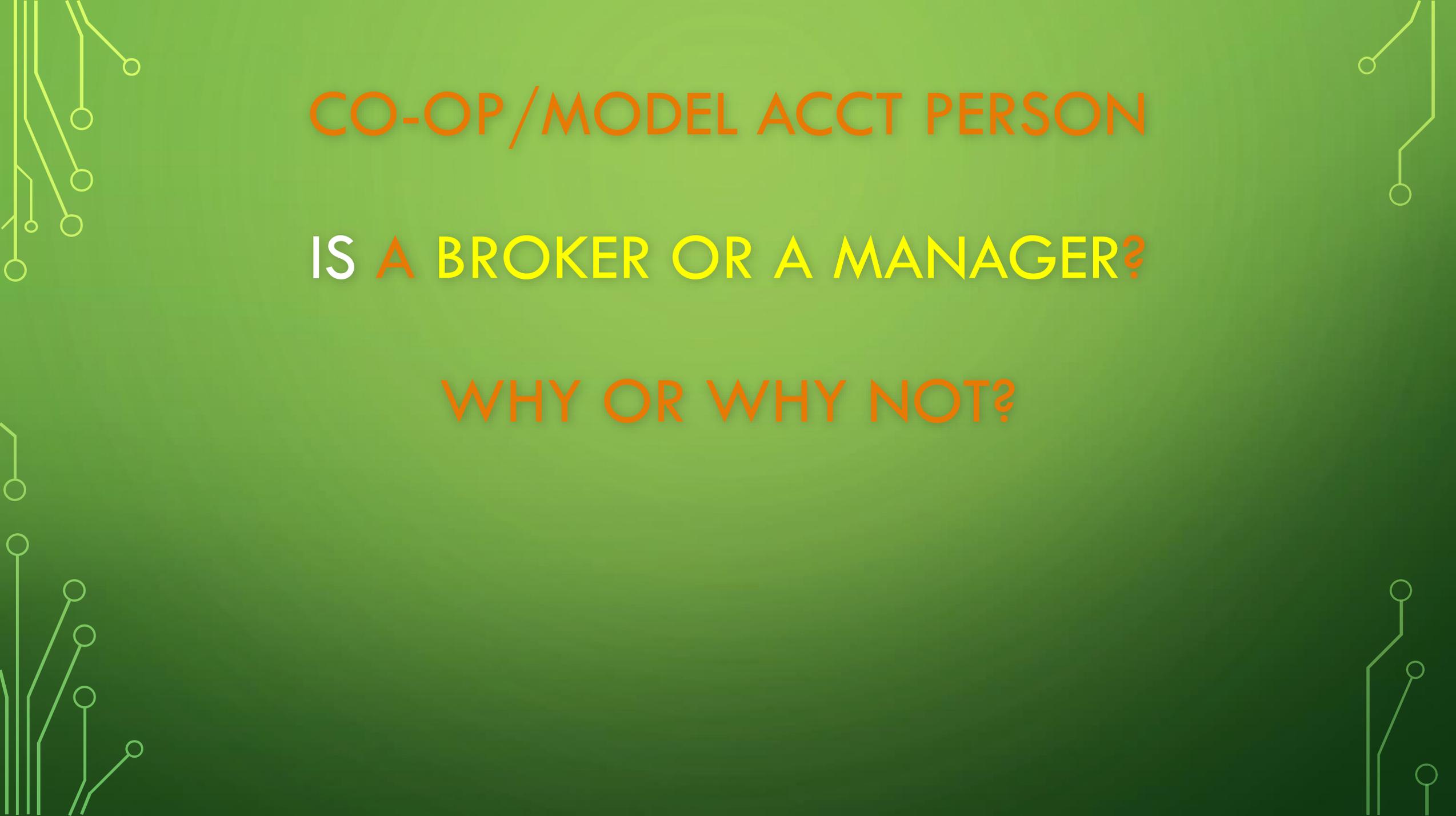
WHAT DO YOU “MOST” MISS FROM IN  
PERSON/IN OFFICE WORK ENVIRONMENT?

YOU = BROKER

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

YOU = MANAGER

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

The background is a dark green gradient. In the four corners, there are decorative white and light green circuit-like patterns consisting of lines and small circles, resembling a stylized PCB or network diagram.

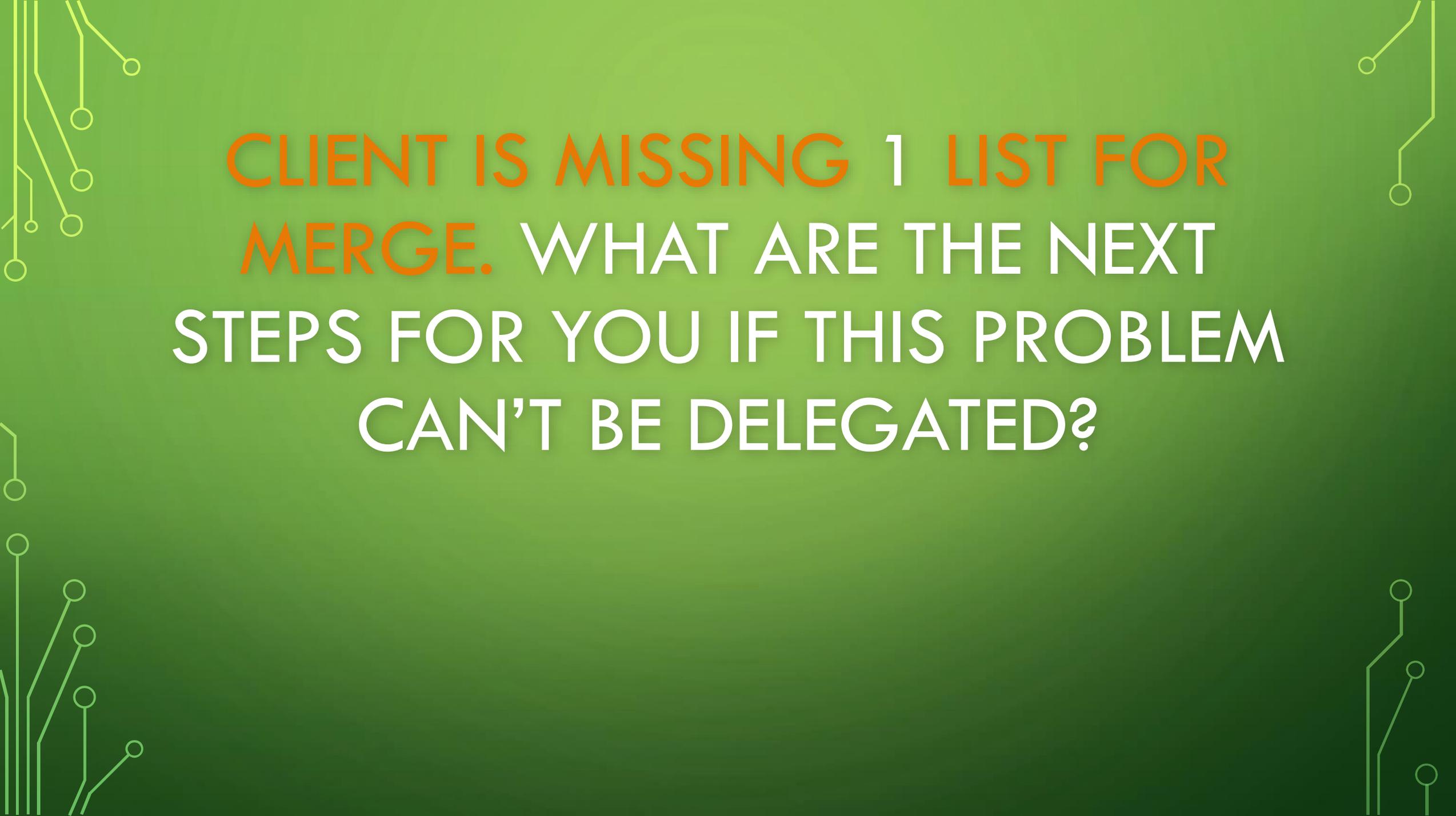
CO-OP/MODEL ACCT PERSON

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?

The image features a dark green background with decorative circuit-like lines in a lighter green color. These lines are located in the four corners, forming a frame around the central text. The lines consist of straight segments connected by small circles, resembling a printed circuit board layout.

**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?

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COMMUNICATION WITH AN  
OUTSIDE COLLEAGUE OR  
COMPANY MAY BE AN ISSUE.  
WHAT IS THE NEXT STEP FOR  
YOU?

Who here **today** can help?



# LIST BAZAAR

The Legend returns...

THANK YOU!