



WIG Summer Summit Series

July 1, 2021

“Empowering Customers and Small Businesses”

“MAGIC- Make a Great Impression on Constituents on Constituents, Customers, and Let’s Not Forget Compliance”

Featuring:

Hawaii State Representative Lauren Matsumoto, Vice Chair, WIG Board of Directors

Alyssa Betz, Director, Brand Production and Protection and Customer Trust, Amazon

Ashlyn Roberts, Manager of Governmental Affairs and Communications, The Small Business Roundtable

Katie Vlietstra, Vice President for Government Relations & Public Affairs, The National Association for the Self-Employed

Theo Prodromitis, Co-Founder and CEO, Spa Destinations

North Carolina State Senator Vickie Sawyer

Elizabeth Bartz, President and CEO, State and Federal Communications

Rep. Lauren Matsumoto: Welcome and thank you for joining us for the final session of the WIG Summer Summit Series! I’m Hawaii State House Representative Lauren Matsumoto and I’m also the Vice Chair of the WIG Board of Directors.

[Women In Government](#) is a nonprofit nonpartisan organization guided by an all legislator Board of Directors. So before we get into today's double header program started, I wanted to just give you a few quick notes: please introduce yourself in the chat box, so if you have any questions or comments write them in the chat box at any time, make sure you select to everyone in the chat so we can all see what you say. Please select speaker view from the zoom view options for the best view and we'd love to see you [tweeting](#) with the hashtag: #WIGSummerSummit, so let's all stay connected and please use that hashtag when you post. And I’d also like to give a big thank you to our [Summer Summit](#) sponsors for all of your support. It really makes a difference to putting all of these things on and as a board member, I can't tell you how much I really appreciate it. And just being able to learn so many wonderful things and I'd also like to give a huge thanks, and I want to say mahalo because I'm from Hawaii to our business council members and associate members, we couldn't do it without you.

So now on to today's first program *Empowering Customers and Small Businesses*. Please join me in welcoming our participants in the interest of time we'll post their full bios in the chat box, so take time to look at that.

Moderating today's panel is Alyssa Beta. Alyssa is a Director of Public Policy, leading [Amazon's](#) brand protection and customer trust policy team. Supporting Amazon's US retail operations on policies related to sellers, small businesses, brands, counterfeiting and product safety. Our speakers today are Ashlyn Roberts, Manager of Governmental Affairs and Communications for the [Small Business Roundtable](#). Katie Vlietstra is Vice President of government relations and public affairs for [National Association of the Self-Employed](#). We have Theo Prodromitis, Co-founder and CEO of [Spa Destinations](#). And North Carolina state Senator Vickie Sawyer. Alyssa, the floor is yours.



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Alyssa Betz: Thank you so much Representative Matsumoto for that introduction I’m very excited to be here for this discussion. At Amazon, we strive to be earth's most customer centric company. We deliver on that vision by creating shopping experiences that customers, sellers, and brands can trust. Today we have over 300 million active customer accounts and over 1.9 million selling partners worldwide, most of which are small and medium sized businesses. Those third party sellers represent approximately 60% of sales on Amazon. And we prioritize efforts to help our selling partners manage and grow their businesses on Amazon and ensure customers shop from authentic products in our store. In fact, last year we invested over \$18 billion in logistics, tools, programs, and people help small and medium businesses succeed. We’ve also invested over \$700 million and more than 10,000 people protect our store from fraud and abuse. We will continue to invest, invent, and improve the tools needed to protect and empower our customers and selling partners.

We have an impressive panel assembled today as you can see, so let's dive right in. Theo if I can I'd like to start with you. As the CEO of Spa Destinations your company was an early ecommerce adopter, you also are an advocate for the interests of women in business, and small business leaders nationwide. Could you tell us a little about your small business story and how you became a policy advocate?

Theo Prodromitis: Absolutely, and I am delighted to be here and I just want to thank each and every person that's here that's listening, and that is open. I’m Greek and I always love the opportunity to be heard on behalf of small business owners and women, especially in business and it's really my honor so I'm gonna tell you a little bit about my story. And that includes being a sales and marketing executive for many years and I launched my own product line in 2003 as a direct sales company and then 2008 happened with the crash, and everything changed. So we needed to innovate and we looked online to Amazon. And we sell natural sponges and all kinds of goodies.

And we looked to innovate and to sell on Amazon, a lot of my colleagues said oh don't sell, I hate to say that to tell you that, but they said don't do it they're too big they're going to crush you they're not small business friendly every scary thing that they could tell you. And I thought to myself ‘well you know what? I never been somebody who's going to listen to somebody else's opinion that doesn't sell on Amazon.’ So, fortunately for me, because you'll see I've had great success on Amazon as a seller and on all the other platforms I sell to is that I decided to stick my toe in the water, and actually represent my brand Spa Destinations online on Amazon. And I'm just over the moon that I did because as business has evolved, that was an early adopter and I’m glad I didn't listen and I dove in to take advantage of all the programs that Amazon offers and it allowed me to be a smaller brand, emerging brand but leverage this huge infrastructure of Amazonians who come up with all kinds of programs for brand protection for advertising for sponsored brands and really helped put us on the map. And really revitalized our business and as an early adopter. I became very popular in my business community because everybody



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wanted to know. Theo, how do you do it? Oh my gosh it sounds so scary. Are they really small business friendly?

So I've had the wonderful opportunity to be a member of the National Retail Federation Small Business Advisory Council and share my passion for selling online. When COVID hit, I was extra popular and I started doing just a weekly free webinar because everybody was calling me saying “how do you sell online? How do you really do it?” and “Is it small business friendly?” I started sharing and becoming more of a policy advocate of how these policies really do affect us and, at the bottom line I think my experience in testifying before the small business committee at the House of Representatives that the legislators were so open to hearing the real story because they hear all kinds of third party good and bad, but the real story that I have to tell is that it is an innovative opportunity for any size brand to actually get on there, protect your brand. All kinds of programs grow, have fun, and leverage the infrastructure of a huge company, so I am just here to share with you my passion for that because as being Greek you know it's part of it's a family business. I work with my brother, and I also try to inspire other people to take the plunge and to actually get online because I believe it's our responsibility as brand owners to protect our brand and to actually represent it ourselves online. And a lot of the product searches begin on Amazon so you're going to want to have your brand on there.

And if I sound like I am gushing about Amazon it's because it's afforded me the opportunity to have three kids, single, and I homeschool them, even before the pandemic and it's created quite a quality of life with a lot of backing of what I call the 800 pound gorilla that they are; for a logistics expert, for advertising, for brand protection, for everything that I need to help me to stand out in the marketplace.

Alyssa Betz: That's such an inspiring story and I love how you like share the message of how you did it. That's like one of the most important things that we hear from small businesses, so definitely want to hear more about that, if we have time. Ashlyn, can I ask you a question, or two. Amazon works with more than 2 million independent partners in the US, many of whom are likely members of organizations that comprise the Small Business Roundtable. This past year has been challenging for many small businesses, yet selling in Amazon stores enabled hundreds of thousands of smaller companies to sustain and even grow or sales, despite the COVID19 crisis.

The past year has been challenging on a number of fronts. What role has ecommerce played in supporting small business growth during a time when many business owners face closure or capacity restrictions? What were you hearing from your members?

Ashlyn Roberts: Absolutely, thank you Alyssa for that question, and thank you, Senator Sawyer and Representative Matsumoto for joining us today. As we've seen, of course, especially among traditionally



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underserved communities that small businesses were disproportionately impacted this past year. Typically, these groups and many of our members will fall within the travel, the retail events, food services, and many more industries many which that have traditionally relied on their brick and mortar servicing.

And I think this past year, really has illuminated the role that digital tools have played in helping provide business resiliency for entrepreneurs nationwide. Adopting these digital tools have allowed many mom and pop shops to evolve their businesses, evolve their business models, and really scale their companies.

A lot of our members from Small Business Roundtable span from The Association of Women's Business Centers to the US Black Chamber of Commerce and we really have taken this time to take the opportunity to scale our businesses and then these online platforms really have enabled these entrepreneurs to increase their market base and compete on a global stage.

We have also seen a lot of business starts over this past year as well. Business starts in 2020 were the highest on record, since at least 2004 and of which 33% were made of non-store retailers. And some benefits that employers have seen from these digital platforms span from streamlining functions with automation, saving time and money, and creating a collaborative environment and community online and we've seen that with many of our members as well. And I think, looking ahead, small businesses will continue to consider the e-commerce market digital tools digital payments and marketing and really see the importance that in their strategy moving forward, I think these strategies will continue to play an important role for business owners in the in the long run, or after we return to any normal.

Alyssa Betz: I think you’re right, I think it’s going to be interesting to see how we carry over some of the innovations and responses that we saw in the last year and a half and how that continues to grow as we move into this next phase. Senator Sawyer, state governments faced the daunting task of carrying out federal programs and acted to support small businesses, and at the same time, developed their own programs to further assist businesses impacted by the challenges created by COVID 19. As our country continues its own path to economic recovery, what can state legislature is due to continue to help fuel small business growth.?

Sen. Vickie Sawyer: Yeah, thank you for that question, and something I wrestle with a lot because I am a small business owner. And before this whole era of COVID began, I was huge and still continue to work with government to try to reduce some red tape and regulations that really hit small business folks hard and harshly. So, there are some barriers into owning your own business and being profitable and successful that government puts up that we need to take down. But, most importantly, what I really



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think that’s vital to the health of our small business community and all our business community is: transportation and investment in transportation infrastructure. You know your supply chain that goes all the way down to your customer and oftentimes the sweetness of the delivery of the product that you have and the happiness of your customers directly correlates to your ability to serve and meet the needs of your customers.

As the US Government, is our responsibility to make sure that the transportation is there. You don't sit in traffic, have all the things that we all fuss about maybe in not nice language, sometimes we do that here in North Carolina because our roads can be so congested. So a very big push for me and setting up an NC 10 Commission was getting all the transportation players in the room because in North Carolina at least, and really across the nation, we as state governments have to have serious conversations. I had to replace the income of gas tax. And so we have kind of put our heads together and start working with all the different groups about how we can not only sustain the revenue coming into our department transportation, but also grow it by a billion dollars in the next six years to meet the needs for our business community, so that they can thrive and prosper.

Alyssa Betz: I'm sure there are many, many legislative proposals that have come to mind in this time and curious to kind of hear more about that too. And Katie it's great to hear about so many issues that legislators can take on to support small businesses. Are their policies or legislative proposals that come to mind, for you that may have a negative impact on growth? Any issues that are specific to e-commerce?

Katie Vliestra: Thanks Alyssa and I apologize everyone that you're just seeing my caricature. I've landed on the west coast this morning, so I could have one of those very famous passenger driving photos up right now but I'll spare you.

So you know it's interesting hearing what everyone has been saying. I think that there's been great innovation that has happened especially in light COVID. You know, so many state and the federal government have made it easier for businesses to fully embrace not only digital tools, but e-commerce platforms. But what I will say, is, I think that in that embracement of these tools adopted, unfortunately are starting to see some things where I think it's a little bit of a lack of education and understanding as to how businesses do operate online and then move for us to get over correction for both the federal and state bodies to over regulate. And I think State Senator Sawyer just brought it up, there are some unintentional ways in which we kind of get in the way of small business. And one of those things that many of you may have heard about because many state legislatures, the last session took to address it, but was a lot about consumer protection and consumer safety of products sold online.

There was a brief moment where it was introduced to the Senate, or has been introduced to the Senate, called the [Inform Act](#), and that is one piece of legislation, where I think every time that we're able to go



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in and advocate talk about what this would do, how this could impact the business, and how they operate online, lawmakers get it, and I think that this is where it's really important for Women In Government, for its members to ensure that they're really talking to small business owners as they're contemplating and proposing legislation and they fully understand. And we really have to work hard to ensure that we're putting forth legislation, for example, consumer safety is actually a huge issue we should ensure the products that we sell online are safe and secure, but that we're not unintentionally harming businesses who are selling online that are abiding by the various platform rules. I really think to Theo's point, to having such great success, so I think there are a few things like that. And I think organizations like WIG and it's its partners can really do a lot

to benefit the education of elected officials to understand where we need a resolution to support a problem. And where we can say you know what, we have really good checks and balances in place we don't need legislation like that. Alyssa I hope I came through.

Alyssa Betz: Yes, you did come through. And you make such a good point and it kind of goes back to what we said at the beginning, like the voice of the small business community is just really important as we talk to lawmakers and figure out solutions to problems that we are all trying to solve. And your example about the Inform Act was completely on target because legislators think they're helping in one way, but not hearing about the impact of small businesses in in another way, and they don't have the full scope of the impact of legislation. So, once they hear about that, it does tend to change people's minds. Theo, can I ask you, as a follow up to what Katie described when she was talking about the Inform Act could you talk about your own brand protection experiences you think about like the Inform Act will help protect against counterfeits and stolen goods? And from your perspective, do you think there'll be an impact on small businesses, like yours, that are either currently selling or looking to sell online?

Theo Prodromitis: Well, I think Senator Sawyer and Katie summarized it. My experience has been that that's just more red tape, it's going to really devastate small businesses because counterfeiters and nefarious actors that I've run up against. And Amazon, with them getting on my listing, Amazon has resolved it. We're on the platform, it's encrypted, we're safe. Same thing with eBay, we have vehicles in place. I have to provide my documents; it has to match my bank account. They do a great job of verifying who I am but in the Inform Act, in particular, think that the mechanism would really be a detriment to innovation and small business owners because it has an exclusion that if you work from home they'll just say no address available. Well that'll devastate me because people will just say, “Oh well, she's just a hokey little individual seller; no address.” And it's going to discriminate against women and small businesses. I think it has a noble intention to protect consumers, but I think the consequences will be nefarious actors are not going to be impacted by the informatics you're not going to find counterfeiters, who can make a fake Fendi bag. They know how to do it, and I think Amazon, has done a great job. I've



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run into several problems with people listing and not only with counterfeit products, but people who have an authorized product or their products that are not fake but they didn't go through the regular supply chain. Having an encrypted workplace where we can actually communicate with them and they don't know my home address or even my business. It saves a lot of additional potential legal action. If they have a team of lawyers, a big company, and you have a little seller on Etsy who is selling dog collars, which is a client of mine. And she gets a cease and desist because somebody says something, because now she's out there. And the reporting requirements, I just can't see that these additional steps are going to have their intended consequences. I just think it will be a nightmare. And I work really hard with small businesses and women to encourage them to get on Amazon. If they have more red tape and they missed the three day window and their business is shut down because they missed an email. Or they are the high volume seller, which is 200 transactions. I mean my grandmother could knit 200 things.

So I think that i'm passionate about it because I don't think it's going to get the goal and it's not needed because the platforms already have a safe environment.

Alyssa Betz: Well, I love to hear about your grandmother's knitting skills. I'm sure that's where you get some of your passion from. I want to shift gears just a little bit and looking forward Ashlyn I have an additional question for you. At Amazon we're really proud to know that, during the pandemic from April 2022 January 2021 Amazon sellers have seen a 55% year over year growth in sales. And we hope to continue to see this growth for small businesses online and on Main Street. Can you talk a little bit about what your members are seeing as what's needed for the road to recovery? What else should lawmakers be doing to help small businesses thrive? And if anybody else would like to share their thoughts on this question, please feel free, but I thought I'd start with you.

Ashlyn Roberts: Yeah absolutely. That is a fantastic question, and of course we are so grateful for all the legislation that has been passed really to prioritize these traditionally underserved communities. I think

it is incredibly important to not forget about small business during this time as well, and so, for future legislation really just keeping small business at the forefront of your mind. We really want to continue to fight for traditionally underserved as well as broadband access, we find that incredibly important as well. I'll go ahead and let the rest of the group respond to hear what they have to say and I'll jump back in that's all right.

Alyssa Betz: Absolutely. Anybody else want to comment about things that lawmakers policymakers should be thinking about as we're transitioning into this period where we're having more recovery? Things are opening back up people. How can we be supporting policies, how can we share our perspective, as the small business community, with lawmakers to talk about our needs right now?



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Katie Vliestra: One of the biggest things is like let's not lose, I think the good things that came out of COVID., And the ability for businesses to innovate and transform. And I know it sounds funny, I live in Washington DC, you know how we've seen stores go online in DC. Council makes decisions so that businesses can have you know, flexibility and how they operate their businesses, I mean, even if it's as simple as a string theory. Or you know, adding alcohol to take out, I mean those things actually really do matter for businesses and it helps them. And then I think you know how can we continue to support the infrastructure, and I know that again, State Senator Sawyer mentioned this, you know infrastructure, broadband, ensuring that people feel comfortable selling from their home, I mean, these are just huge ways in which people really navigated the pandemic and I know that.

The loss of life and job and economic growth was substantial, but in some ways, there were some really I think really positive stories that came out of it, and so I hope that across all levels of government, even down to your zoning boards that you were really thinking about like ‘how can we support small businesses, how can we balance it all out?’ Because I know that's the tricky job, but really not lose sight of the fact that more people are actually starting small businesses. I think data just came out, which is not unusual from the National Association for the Self-Employed. We see this during economic downturns that more people actually start businesses during this time, which sounds counterintuitive. But in some ways it really does force people to take that leap and so as we're thinking about that, I would encourage all of those elected officials on the call to really think about the areas in which they have our purview to influence and think about it from a small business lens because many millions of those small businesses will be healthy, happy, small businesses that will employ people, pay their taxes, own property. There are some gems that will turn into big businesses that can become great stories for people to emulate but also know that they too were a small business.

Alyssa Betz: Absolutely, and you really touched upon one of the key features that I think will probably be taking away from these last months to a year and a half is like the story of innovation and adaptability and how people responded, not only in their work lives, but their personal lives and how the two work together. So, I think that is something we'll be hearing more about as we reflect on the time that we've just come through. Ladies, I really appreciate all of your comments.

At Amazon, our commitment to supporting small and medium sized businesses and adapting together for the future, has never been more steadfast. As you've heard today, Amazon stands behind our selling partners and the hundreds of millions of safe and compliant products that we offer our customers. We continue to innovate, to provide customers with peace of mind every time they shop in our store, and to help our sellers increase sales and grow their businesses. We look forward to working with you all, as we collaborate on ways to support America small businesses now and into the future. I'm going to turn it back over to representative Matsumoto to continue into the next panel. Thanks everyone.



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Rep. Lauren Matsumoto: Thank you so much Alyssa for moderating a really important discussion. I mean I learned so much, and I really enjoyed all the areas that were really applicable to our state policy. So many thanks to all the speakers today for providing a great perspective. Well now we're going to jump right into our next session: *MAGIC- Make a Great Impression on Constituents, Customers, and Let's Not Forget Compliance*. With us today is Elizabeth Bartz, President and CEO of [State and Federal Communications](#). Just as a reminder, please write questions and comments in the chat box and Elizabeth welcome, the floor is now yours.

Elizabeth Bartz: Thank you. Thank you, everybody. I have to say, from the start, if I didn't know how many of my colleagues are dealing with the issue of ailing parents. I would have changed the topic of this conversation, so we could have had a discussion, it's just something that a lot of people are doing. My sisters and I are working through things and I appreciate everybody's kind comments about, you know, everybody working together. But when I was given the opportunity to do this session, I may have missed the part about where it was supposed to be a panel. Because I just kept saying oh i'll just do it i'll just do it, and many of you have heard me talk about ethics and lobbying laws and campaign finance laws to you can't stand it anymore. Doesn't she know anything else, well, I do know a few things. I thought that this subject MAGIC which I heard in a program, and I think it was this scale raider program in Northeast Ohio that helps businesses increase revenue. It's a seven-month program and it's a heck of a lot of work, but it is really good, and when I was talking to Laura and Senator Todd, instead of it just being make a great impression on customers, I wanted to add something about constituents, because we at WIG is made up of legislative women. And I guess I couldn't get away with not saying something about compliance.

And the next slide I want to talk about constituent relationship managers. Our WIG members have constituents and working with them can be time consuming. So, what's important is that your innovative be innovative, with how you want to reach out to your constituents. Innovation is finding new means of delivering your mission that expands your legislative work in impact in tangible quantifiable ways, it's a process, it's not an endpoint. Very important and at this time where we really are still in a period of disruption, you have to lead through it and rethink how you work and re strategize. The ways you communicated five years ago have changed so much. You need to find ways to go into new programs to make sure you're digitally savvy and really in your mind which I don't know if I can say a whole lot about my mind these days. But in your mind, keep track of things and have a constituent relationship manager. A spreadsheet or a database of some type, not necessarily just for keeping track of your donors, but keeping track of who these people are in case you need to contact them. You know Vince Lombardi said, “the person at the top didn't fall there.” And so, you know you want to reach to the top and you want to be somebody who reaches out to your constituents.



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I just have a couple of examples to give on this. I know that everybody here has much more important and stronger examples. My dad used to own a Subway sandwich shop. Theo and I were talking and we’re both Greek, so you knew that there was a diner in there somewhere. But he had a Subway sandwich shop and the Mayor at the time was Mike White from Cleveland. And my dad used to send over sandwiches. It's a little thing here, I'm just sending over some sandwiches. I heard you're having a meeting tonight these might be helpful. So one day, there is a water main break right in front of the Subway. Nobody can get through, it's a mess for a long, long time. And the Mayor started having these meetings at my dad's Subway shop, which was kind of cool for my dad. But it was the Mayor's way of thanking my dad for helping him out through a lot of different ways.

I had my own little issue here. I don't know if Alyssa is still on knows of this issue. But one Friday I got a text from Akron Mayor Dan Horrigan on my cell phone. And the comment was I just met your client Amazon.

I'm looking around, where is he, and how did this come up. And I said I asked him, “where are you?” And he said I’m at South by Southwest. Well I had never been to South by Southwest. that changed that year. I’ve been going every year and I love it. And I said well let's talk next week, I knew that there was a chamber dinner, so I saw the mayor and I said “how did this conversation come up?” He said “well, I went up to the Amazon booth at South by Southwest” and if you've been there, it is a football field wide and he said “hi I'm Dan Horrigan, I'm the Mayor of Akron.” And I don't know if the guys that we work with are trying to see who does Elizabeth know. But the one man said to Dan Horrigan, “do you know Elizabeth Bartz?” And what do you think the mayor said? “I love Elizabeth Bartz.” But we were then able to help Amazon build a fulfillment building here in Akron Ohio. All by just connecting Mayor Horrigan with the right people at Amazon, and you know he remembers and he thanks me all the time. My nephew got a job there, but I don't think that had anything to do with it, I think they just needed to hire 1500 people.

And so, there are a lot of different ways that you can remember your constituents. The next slide really talks about our client relationship manager. Businesses have CRM, so I have a CRM so I know whenever we contact people. But we have this wheel up in our office, well, I should say we used to. We did some renovation. Last night I was like ‘where's that wheel?’, but the graphics department, had it digitally, and so we have this wheel up to show people that what is important to state and federal communications. And this is one of the reasons I wanted to do this subject because I knew Amazon was talking before me. And I just think we need to talk about how we can provide good service to our constituents and to our clients as a business owner. Oh, I think about this 24/7. I'm always thinking about what could I do, what should I have done, and how can we make things better? And we talk about providing excellent customer service, you don't want to be the company that's like well, maybe they're right maybe they're not right. No that's not why people are working with us. State and Federal Communications is a customer focused political compliance company which makes it easier for the government relations



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industry. And we always say that a subscription to our guidebooks is not an expense on the balance sheet. It is an investment for your compliance program and when I have this up, I want people to know that we need to create that client value, like, I am glad we work with you because I needed this information. I want them to have the entrepreneurial spirit. We have a great bonus program, we have a profit sharing program. The more successful the company is, the more successful everybody is.

Taking care of our people, this is the number one, and this is more for me. Taking care of my people here at the company. If you've been on Facebook, Twitter, or LinkedIn today you'll know is the 28th anniversary of State and Federal Communications. I don't know, I must have been doing something right. I don't have an MBA from Wharton. I learned at my dad's hip, remember he owned a diner before he had the Subway site sandwich shop, so business wasn't a big part of my education. But i've learned a lot about taking care of people. Respect for all people. I put this chart up in 2009 and it's so important. It's as important now as it was back then. Always doing the right thing- okay for clients, you always want to do the right thing by them. Building a strong relationship is so important. I really want people to know that they're just not an invoice that we send out, they are somebody that's very important. When we bring in a client to help them with their lobbying compliance. It's just not one person we're bringing in a whole new family of people, we have to learn, and know, and work with. And so it's important that that you're able to do that and we always give back. It is important, it is a huge part of this company that we are giving back to our community and to the country. One of the things I like to say is: what do you expect when we come into the office? Well, I want your energy. I want your energy. I want your focus and really, I want everything you have I want everything you have to help make us just that much of a better company.

I know there's some comments. I took my glasses off so I'm sure we'll get to these questions.

Compliance relationship manager. I knew I had to say something, it is just it's more important now than ever.

I am a corporate crusader for compliance, it says so, on my LinkedIn profile. I do not like to see anyone on a list for not filling out their disclosure reports. And I tell people all the time we'll do your first report for free to clear up your record. Before Al Gore created the Internet, there was a paper newsletter and it was called the Inspector, but this like short man with a big monocle and now it's an electronic thing which is worse because you failed to file a report and it's on their website the next day. So, I have a tendency to check that list, make sure nobody I know is in there. One month I opened it and the Akron Art Museum was in there. The Akron Art Museum? What? I didn't even know that they were a lobbyist. But worse, we're a business member of the art museum and I called my contact there and was like you got to connect me with somebody who had something to do with this report. We have to get this fixed I'm happy to help you with it. There was a lot of going back and forth the person who was the signer, of course, not there anymore. And they needed to figure out what they needed to do. Well, they were



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working on a project, the project was over. They had a contract lobbyist who never told them that they should terminate their registration. And so we help them do that. So, no I didn't get a new client, but they love us and we love the Akron Art Museum and we want it to be a great representation of our city.

And the other example, and now you're really going to think I'm a weirdo. But late at night, if I don't have anything to do and Katrina Iserman is on this call, so she knows that I'm a huge shopper. But even, I have to stop sometimes. And I look at people's campaign finance reports. It's weird but I look at their campaign finance reports. We have a big race coming here in Ohio Marcia Fudge, who is now Secretary and her seat is

vacant and the governor has called an August 3rd primary election. So, a woman I know in Akron called me to contribute. I was like “I'm really supporting the other another candidate.”

But that night I started looking at this candidate’s campaign finance report. And do you know that that woman who asked me to contribute, hadn’t contributed herself? So, like I never asked people to give money if I haven't like done it myself. But what I did notice, kept me up the rest of the night. There is a man, I'll tell you his name. I'm sure you don't know them. If anybody does, he already knows this. His name is Joe Camper. He used to be the CEO of Go Joe. Go Joe is the maker of Purell. And he is retired, but I saw on this candidate’s campaign finance report that he had made a \$2800 contribution to this candidate in January. I thought that's kind of weird you know the maximum is \$2900, old Joe didn't have an extra hundred bucks? Well then, I looked again and on March 5 he gave \$100 so there was this \$2900 earmarked for the primary.

But then he also went and made another \$2900 contribution on the same day, probably didn't see how he was doing it, I don't know. I just knew he over donated and you know that's not something that might fall on him. But the candidate should have really looked at this before she signed off on the contribution report before it was filed in April. So, I happen to have had his cell phone number. I didn't call him that late at night I waited till the next day. But I did get in touch with him and said, “Joe, this is what happened.” And he said “well that wasn't what I intended to do.” I said “well you earmarked them all for the primary.” And the easiest thing you can do is ask the candidate to earmark one for the general. “Now if she wins the primary that's cool, you've already made your contribution and please don't make another one. But if she doesn't win the primary, she will have to refund you.” And he was like okay that's what I'll ask them to do. Again, not a client, but just wanted to keep things clean and in the area. Hopefully, this could lead to something to work with Go Joe and if it doesn't that's fine. But he knows that I tried to help him out but there's always examples of things always.

So, the Hawaii Ethics Commission went after the Ohio State Department of Health and after Costco once because they violated Hawaii's beverage container deposit requirements. I mean somebody should have really been looking out after this and, worse, they had sent 15 emails to the company and nobody



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responded. Okay, I understand if you get it and you don't know what to do, and maybe I'll set it off to the side. But if they keep sending you letters, you really need to respond.

You know Alaska's campaign finance watchdog slapped a former state lawmaker with a \$20,000 fine saying he broke multiple laws with vague and sloppy reporting. If you just kind of scribble things and hope that they don't look at it, that's wrong. You're sort of marketing yourself as a target for an audit and you really need to be able to defend yourself. That was just in June, and that was a state issue. A city issue in June, founded by former law enforcement officers who heavily backed Philadelphia DA Larry Cray's opponent in the May primary has been fined for violating the city's campaign finance guidelines. Protect our police pack which poured money into ads that helped Cray's challenger Carlos Vegas campaign miss the filing deadlines, on seven campaign finance reports. I don't know how anybody gets involved in campaign finance who doesn't understand that there are reports to be filed. It's 2021, you register, you must file reports, and there are names associated on the registration. And, in this case, the Pack in its president had to pay a \$12,000 fine according to an agreement made by the city's ethics board.

I want to just take an opportunity to really just talk about how much relationships are. How important they are for you, as legislators, for you as Members of the business Council. And compliance is important for everybody. Legislators have reports, corporations have reports, packs have reports. And it's just important to really do your homework and have that task list ready with your calendar as to what needs to be done when.

So either there are no questions I don't know. I'll put my glasses on, and I can see. Representative Matsumoto are there questions as well?

Rep. Lauren Matsumoto: I actually have a question. Constituent communication is one of the most important things in our office.

And I'm so excited to share this webinar with my staff, and so I wanted to ask, do you have any tips for a training staff on how to give good services to constituents? And really if there's any other tips, and if there's any programs or things that you would recommend for our offices?

Elizabeth Bartz: Well, I know everything about constituent relationship managers, by going to Google. Which is how I put together that part of the presentation and there are programs out there. I'll have to pull it, I left it over at my house when I was finishing this up. I'll have to pull it, but it was a program about how to do constituent relationships and you know so many different fields, the date that you know where did you see them, where do they live, what is their relationship with your district. And you know a lot of it can be, I have to tell you, that Dale Carnegie's got it great. He's got that program on you



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know customer service and we've set our own staff there, and you know it's more business oriented, but you know can't go wrong with Dale Carnegie.

But, so I don't have a specific one. I know that there are companies out there, like DDC and Aristotle and Cision all based in Washington DC area. That have programs to help you, with your relationships with legislators. The other company is Quorum and FiscalNote. Again they're all based in the Washington DC area, and I know just from my relationships with them that they do have those programs, not only to help corporations, with their client relationships, but for legislators to help with their constituent relationships.

Rep. Lauren Matsumoto: Nice and maybe if you also have some tips on, I know we've all had that situation, but dealing with difficult constituents or difficult situations. Do you have any tips on how to handle a call or an email with a constituent that's not happy? And then I do see a question here from representative Cindy Ryu on constituents. There are those frequent flyers and how does the staffer deal with them, especially when they become combative?

Elizabeth Bartz: You know, it is difficult. And I have a nice smile on my face right now, but sometimes I'm not so nice on the phone when somebody is just you know beating me up about something. I'm also very, to the point about things, but I know exactly what you're talking about regarding frequent flyers. People who are just calling and asking in the difficult and it's a great training program for your staff. And I'd like to say it's important to do role playing, so there really might be somebody on your staff who that's their job; their job is to take care of these callers. Well not everybody is an expert on everything, and not everybody is great working with difficult callers.

I had somebody call once because they didn't like the comment somebody on my staff made. We didn't write anything wrong or anything, and they weren't in trouble, he just didn't like the response he got. He just didn't think that my staff person cared for him as a client. And I had to go in and talk to him and say you know these people, if we didn't have these people there wouldn't be a company, and so I tried to make sure that if somebody doesn't want to talk with somebody, that we try to give it to somebody else who might be a little bit more expert.

Patient could be a possibility, so that they can help them out because you know those people are the ones that will start the underground rumor mill when you're up for reelection. You know you don't need that stuff. I don't have time to look and see who doesn't like me. I'd much rather read all the good comments and I don't want anybody to think that somebody here didn't care about them.

Rep. Lauren Matsumoto: Thank you. I want to make sure I look in the chat if there's any other questions. We're coming up on the end of our time. One more question I see is: what do you think is the biggest compliance challenge in our new virtual environment?



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Elizabeth Bartz: Is understanding what is, in our case with a lot of our clients is this communication by Zoom now considered a lobbying activity? Do you know, there are states out there that say no, if this is how you're communicating, this is not lobbying, because our statute specifically says, you must be in the state capital for it to be considered lobbying. So, it's important that you know what you're doing and it's important for you to know that the work you're doing is lobbying or it isn't lobbying. Because in this kind of communication maybe your opponent or your competitor can't see you, but if they see that you've gotten some bill passed, they're going to do the research to find out how did you help get that bill passed when you weren't a registered lobbyist. And that is, you know, again I try not to spend time on things that we could have fixed the first time. So, we try to make sure we're talking about that, so that if we have to comment on something that we're doing it correctly, so that we're so everybody can go on their way.

Rep. Lauren Matsumoto: Perfect. Well thank you so much Elizabeth for closing out our Summer Summit with such a great session and such an important session. And just a quick reminder to everybody, please check out WIG’s newest toolkit on malnutrition in the policy library.

And I'd like to thank everyone for attending the Summer Summit. All the session recordings transcripts and the resources will be posted to the WIG website next week, so if you missed a session, please be sure to check it out. Thanks again and we look forward to having you added to another WIG event really soon.