

# LUNCH BUNCH 11/1/18

<http://leads3.org/>

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Tuscany Tavern 11/1/18 @ 11:30 am

## MEMBERS (attendees first names are bold and underlined)

1. **Sheree Teller-Hedin** - Advertising Executive, [Colorado Expression Magazine](#)
2. **Charles Holman** - Acupuncturist, [Bear Creek Healing Arts](#)
3. **Holly Worley** - Realtor, [Windemere - Find A Home With Holly](#)
4. **Bob Campbell** - President, [Incognito Solutions](#)
5. **Ryan Holtmann**, Architect & Licensed Contractor, [Design Studio Architects](#)
6. **Cindy Alvarez** - Senior Wealth Management Advisor, [Wambolt & Associates](#)
7. **Lisa Marie Schwartz** - Mortgage Broker, [Fox Valley Mutual](#)
8. **Tara Cox** - Owner/Massage Therapist, [Evergreen Massage](#)
9. **Michele Robbins** - Owner, [RPM Agency - Insurance](#)
10. **Suzanne Levy** - Positive Psychology Coach, [Evergreen Life & Wellness](#)
11. **Casey Claunch** - Business Banking Specialist, [US Bank Evergreen](#)
12. **Arlene Burgess** - Health and Wellness & Skin Care, [Arbonne](#)
13. **Arden Hauer** - Mediator/Coach, [Friendly Divorce Services](#)
14. **Russell Hammond** - Manager, [Big O Tires Evergreen](#)
15. **Rosa Julian**, Team Leader - [State Farm - Nancy Staub's office](#)
16. **Susan M. Brown** - Tax Advisor, [H&R Block Tax Advisors](#)
17. **Tracy Jones** - Attorney, [Jones Law Office](#)
18. **Will Traylor** - Sales Management, [Action Axiom](#)
19. **Janice Kaup** - Professional Organizer, [Clutterbug of Colorado](#)

## NOTES

- SWOT/Business Idea of the Day:
  - Nov 29 - Arlene Burgess
  - Dec 13 - Suzanne Levy
  - Jan 3 - Michele Robbins
  - Jan 17 - Charles Holman

- [Jan 31 - Tara Cox](#)
- [Feb 14 - Rosa Julian](#)
- [Feb 28 - Holly Worley](#)
- Networking groups to know about:
  - *Fri Afternoon Club* [Fri Afternoon Club meetup](#)
  - *Serenity schmoozer* is quarterly 5-7pm at different locations. Next one is a big awards event in January at Mount Vernon. Look for event announcements on [CO Serenity on Facebook](#), their website [Colorado Serenity](#) or on local Facebook groups.
- Upcoming Chamber events with sponsorship opportunities:
  - [Monthly Breakfast 11/7](#)- (bring guests and Betsy will waive fee if you ask her)
  - [Business Expo 11/8](#) - you can have a table for \$25 for your own business. Holly will represent Lunch Bunch + anyone helping can represent their own business.
  - [Sparkle and Shine 12/1](#)
  - [Skate the Lake 12/31](#)
- **Member Info:**
  - *Sheree - accepted to Leadership Evergreen Class of 2019/2020!!*
  - *Charles - apartment for rent in Kittredge available soon. Online booking now.*
  - *Holly - accepted to Leadership Evergreen Class of 2019/2020!!*
  - *Bob*
  - *Ryan*
  - *Cindy - boutique agency that helps everyone, passion helping women in a complex world*
    - *Strengths - works with estate planning attorneys, tax professionals*
    - *Weaknesses - how to make Wambolt & Assoc. unique ability shine*
    - *Threats - lots of financial advisors, recommendations from raving clients on FB*
    - *Opportunities - doesn't have a minimum amount that prospective client needs to have to invest*
      - *How do we help each other with social media plugs/recommendations -*
      - *Private LinkedIn group and Facebook group*
      - *Group texts*
      - *Put summary together for each other*
      - [Leads3.org \(Lunch Bunch website\)](#)> Members > (Mail All Active Members)> we can all email each other

## MEMBER UPDATES

- *Lisa Marie*
- *Tara - NOMINEE! New Business of the Year.....[Sparkle and Shine Gala Dec 1](#)*
- *Rosa*
- *Suzanne*
- *Casey*
- *Arlene*
- *Michele - NOMINEE! New Business of the Year.....[Sparkle and Shine Gala Dec 1](#)*
- *Arden*
- *Russell*
- *Susan*
- *Rosa - open enrollment for health insurance for BC/BS today until Dec 15*
- *Tracy*
- *Will*
- *Janice*
- Policy for Lunch Bunch membership:
  - not more than 1 industry represented in each lead group,
  - have to be a Chamber member
  - guests can attend 2 times,
  - members can't miss more than 2 meetings/quarter
  - See [Bylaws](#)
  - Trackers - quarterly and yearly winners for the most leads, meeting with Lunch Bunch members, attending Chamber events, and business transactions. New quarter started Oct 1. You get points for referrals, bringing guests, etc. At the end of the quarter, the person who has the most points, gets a \$25 gift certificate to a Chamber restaurant and at the end of the year, a \$100 gift certificate to a Chamber restaurant.
  - **Holly is 3rd quarter tracker winner!!** Thanks for your support of our businesses, Holly!!
- Lunch Bunch business:
  - Google reviews - **Sheree and Cindy** will do a presentation
  - Yelp - not worth it, they charge you a lot, difficult to work with
  - Blue Spruce Habitat for Humanity build in Evergreen - **Sheree** will let us know
  - Holiday party discussion:
    - Fri Nov 16th @ 6pm - MARK YOUR CALENDARS

- **Bob** will send out an evite asking for RSVPs from Lunch Bunch members, spouses and children & directions to his home.
- **Tara** will head up this event
- **Everyone** BYOD - bring your own drinks
- Bob can host at his house and supply cups, utensils, plates.
- Use \$500 from Lunch Bunch account for this event.
- Catering ideas:
  - Fresh Tracks - Sarah will send **Sheree** more info on catering
  - Trusan can do the food - \$295 up to 8 people for 4 hours + cost of food
- Treasurer's Report - \$40 for year dues, we're in good standing with the account. Make checks payable to: Lunch Bunch Leads Group of Evergreen
- Chamber business:
  - nametags to wear at Chamber events - **Sheree** will get quotes
  - Power Partners - identify 5 businesses on list, send those names to Betsy Hays at the Evergreen Chamber so she can make a warm lead for you on a Friday. There are 500+ Chamber members so it's a way to meet members that you might not otherwise meet in a strategic way. **Rosa submit names to Betsy by the next meeting.**
  - Referring prospective members to the Chamber - give the name to a Chamber volunteer or employee for official points on the tracker form

## ACTION ITEMS

Everyone's name that is in **red** has their action item listed above.

## NEXT WEEK'S MEETING:

**NO MEETING** Thursday, Nov 15 - go to the Nov 16th holiday party!!