

LUNCH BUNCH 1/10/19

<http://leads3.org/>

Tuscany Tavern 1/10/19 @ 11:30 am

MEMBERS (attendees first names are in 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. **Suzanne Levy** - Positive Psychology Coach, [Evergreen Life & Wellness](#)
10. **Casey Claunch** - Business Banking Specialist, [US Bank Evergreen](#)
11. **Arlene Burgess** - Health and Wellness & Skin Care, [Arbonne](#)
12. **Russell Hammond** - Manager, [Big O Tires Evergreen](#)
13. **Rosa Julian** - Team Leader - [State Farm - Nancy Staub's office](#)
14. **Pam Pagliai** - Tax Advisor, [H&R Block Tax Advisors](#)
15. **Tracy Jones** - Attorney, [Jones Law Office](#) with Jena Fullmer
16. **Will Traylor** - Sales Management, [Action Axiom](#)
17. **Janice Kaup** - Professional Organizer, [Clutterbug of Colorado](#)
18. **Tricia Bass** - Professional Home Stager, [Tricia Bass Beautiful Spaces](#)
19. **Lori Milhollan** - Relocation Specialist, [Armstrong Relocation & Companies](#)

NOTES

- SWOT/Business Idea of the Day:
 - Jan 24 - Charles Holman
 - Feb 7 - Tara Cox
 - Feb 21 - Suzanne Levy
 - Mar 7 - 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.
- Helpful tips for leads and marketing:
 - “Does anyone come to mind?” Ask this as an open-ended question - sales & marketing

MEMBER UPDATES

- *Sheree Teller-Hedin* - a story worth telling - small to med sized business, PR, marketing, media relations.
- *Charles Holman* - we can be complacent with our health issues. With the new year, deal with health issues hopefully without Western medicine drugs. Seminars to veterinarians.
- *Holly Worley* -
- *Bob Campbell* - focusing on membership systems
- *Ryan Holtmann* - commercial and residential. Things are busy right now. Looking to hire.
- *Cindy Alvarez* - help people figure out short-and long-term financial plans
- *Lisa Marie Schwartz* - goal of 6 more licenses by March 1
- *Tara Cox* - 6 therapists and PT, will be announcing new services this year
- *Michele Robbins* - Michele will not be a member
- *Suzanne Levy* - launching 6-week program on Feb 4 (early bird for Chamber members only)
- *Casey Claunch* - business banking relationships
- *Arlene Burgess* - teach people how and why to get healthy and keep toxins out of their bodies
- *Arden Hauer* -
- *Russell Hammond* -
- *Rosa Julian* - wanting to add another license in next 3 months and reading Train Your Brain for Success by Roger Seip
- *Pam Pagliai* - tax reform free class on Jan 31 at 10am and 6pm at the Fire Dept.
- *Tracy Jones* - big and small cases, gives great attention to all cases. Jena works with Tracy.
- *Will Traylor* - understanding SEO even better, see presentation notes
- *Janice Kaup* - working more on productivity help for clients this year
- *Tricia Bass* -
- *Lori Milhollan* - relocation specialist

PRESENTATION BY [Will Traylor](#):

- The Action Axiom - is a truth that is self-evident. Any attempt to disprove the truth actually proves the truth.
- Austrian Economics - only individuals act, incentives matter, scarcity, time preference, individuals have preferences, individuals rank their goals, value is subjective
- Hockey stick - international GDP from 5 M years to 50 M years.
- Fractional Sales Management - outsourcing for: sales best practices audit, create proven and reputable sales process, improve salesperson performance, increase lead generation efficiency, leverage technology (sorry, not in correct order)
- What is usually done by the management - train salespeople, improve sales compensation system, hire better staff, improve marketing
- Will helps to provide a flow chart of sales process, leverage technology, sales management/coaching, improve individual salesperson performance
- Will works with small business with 10 or fewer employees, struggling with leads and needs processes
- ProtonMail.com - free personal or work email service that is encrypted and very private unlike Gmail
- Book on microscripts - Bill Sheely (sp?)

Lunch Bunch business:

- [Lisa Marie](#) will head the Jan 24 meeting and [Suzanne](#) will head the Feb 7 meeting
- Treasurer's Report - \$40 for year dues. Make checks payable to: Lunch Bunch Leads Group of Evergreen.
- Chamber business:
 - Upcoming Chamber [events](#) with [sponsorship opportunities](#):
 - [Speed Networking](#) - click link for fees, location, etc.
 - [Mixer](#) - tonight at 5pm at Buffalo Park Dentistry
 - In It Together - schedule coffee, lunch, phone call, meeting - ask Chamber board members to pick their brains about this
- [Policy](#) for Lunch Bunch membership (click on link)
 - In order to be a member, you have to pay dues!!
 - Trackers -

- quarterly and yearly winners for the most leads, meeting with Lunch Bunch members, attending Chamber events, and business transactions.
- Quarters are Jan-Feb-Mar, Apr-May-Jun, Jul-Aug-Sep, Oct-Nov-Dec.
- 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.

ACTION ITEMS

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

NEXT WEEK'S MEETING:

Thursday, Jan 24, 2019 @ 11:30 @ Tuscany Tavern