

# LUNCH BUNCH 5/2/19

<http://leads3.org/>

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Tuscany Tavern 5/2/19 @ 11:30 am

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

1. **Sheree Teller** - Story Teller at Work
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. **Cindy Alvarez** - Senior Wealth Management Advisor, **Wambolt & Associates**
6. **Lisa Marie Schwartz** - Mortgage Broker, **Fox Valley Mutual**
7. **Tara Cox** - Owner/Massage Therapist, **Evergreen Massage**
8. **Suzanne Levy** - Positive Psychology Coach, **Evergreen Life & Wellness**
9. **Casey Claunch** - Business Banking Specialist, **US Bank Evergreen**
10. **Arlene Burgess** - Health and Wellness & Skin Care, **Arbonne**
11. **Russell Hammond** - Manager, **Big O Tires Evergreen**
12. **Rosa Julian** - Team Leader - **State Farm** - Nancy Staub's office
13. **Pam Pagliai** - Tax Advisor, **H&R Block Tax Advisors**
14. **Jena Fullmer/Tracy Jones** - Attorney, **Jones Law Office**
15. **Will Traylor** - Sales Management, **Action Axiom**
16. **Janice Kaup** - Professional Organizer, **Clutterbug of Colorado**
17. **Tricia Bass** - Professional Home Stager, **Tricia Bass Beautiful Spaces**
18. **Lori Milhollan** - Relocation Specialist, **Armstrong Relocation & Companies**

## NOTES

- Upcoming long presentations:
  - May 16 - Lisa Marie Schwartz
- Marketing tips, events, things to know:
  - Alignable recommendations
  - Fri Afternoon Club meetup

- [Serenity schmoozer](#) **April 17** from 5-7pm at Wild Game
- [Network After Work](#) if you're looking to expand your business contacts down the hill
- ***In It Together*** - new Chamber program - at the monthly breakfast, you can talk about issues/problems in a small group with a Chamber board member who's experienced with that problem can help out at another time.

## MEMBER UPDATES

*1. Sheree Teller -*

*2. Charles Holman -* Deal with your imbalances, don't become complacent, the longer you've had an imbalance, the longer it takes to get it GONE! Preventive is the way to go. Symptoms can be connected. Love your clients and they'll love you.

*3. Holly Worley -* Just got an offer from a buyer on a home she is selling in Arvada. Has a lot of activity going on right now.

*4. Bob Campbell -*

*5. Cindy Alvarez -* When clients need help sorting through complexity, Cindy and Wambolt helps with this even when they don't have a lot of money. Having a financial advisor helps to problem-solve lots of life issues that are intertwined with financial issues.

*6. Lisa Marie Schwartz -*

*7. Tara Cox -*

*8. Suzanne Levy -* Board-certified and personal coach with health and wellness and psychology. Health and wellness is a huge umbrella which can be intertwined with so many issues in life. Everything affects everything else. Offers complimentary 30 minute sessions over the phone which is a way to know whether she can help them or they need referred to a therapist or some other professional.

*9. Casey Claunch -*

*10. Arlene Burgess -*

*11.. Russell Hammond -*

*12. Rosa Julian -*

*13. Pam Pagliai -*

*14. Jena Fullmer/Tracy Jones -*

15. *Will Traylor* - Are you a commodity or are you providing insight and are you liked, known and trusted? Cold calling does not help this. It commoditizes you. Use content or things that actually help people. Developing people's experiences with you helps shape their beliefs about what you can do for them.

16. *Janice Kaup* - Eliminating the non-essential: [James Clear article](#). Suzanne recommends [Essentialism by Greg McKeown](#)

17. *Tricia Bass* -

18. *Lori Milhollan* - Giving long presentation today. See notes below.

PRESENTATION BY : **Lori Milhollan**

- United Van Lines is the nation's largest van lines
- Quotes are always from a walk-through with software she uses - never over the phone
- Bound-not-to-exceed quotes - United and Mayflower do this.
  - Other companies *don't* have bound-not-to-exceed quotes and have weight issues that occur when quote isn't accurate and client ends up owing a lot more because the weight is greater than expected
  - The visual inspection that Lori does is so important so the client doesn't pay more than they are quoted
- SnapMoves - designed for smaller moves under 5k pounds (1 or 2 bedroom apartment)
  - Smaller truck with things loaded in securely banded crates and get shipped to destination
  - Work around your schedule with guaranteed dates
- Armstrong is In the storage industry
- Clear the Clutter program - crew comes out to load clutter into vault that holds 1k pounds which goes into their warehouse
- Things that impact quote - mileage, weight and packing
- Armstrong does local moves but they are expensive b/c they deal more with national and international moves
  - Bill for actual weight, not hourly
- Peak season is May-Sept

Lunch Bunch business:

- 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**:
    - [Taste of Evergreen](#) - **TONIGHT!!** 4:30 pm - 8:00 pm at Evergreen Lake House
    - [Let's Do Lunch!](#) - **every Fri @ 1:00 pm** - Lunch with Betsy to talk about how EACC can better serve you. No agenda. You pay for your own lunch. Don't need to RSVP, just show up.
    - [Mixer](#) - **May 9** 5:00 pm-7:30 pm @ 3Zero3 Motorsports
    - [Monthly Breakfast](#) - **June 5** 7:30 am - 9:00 am @ El Rancho
- [Policy](#) for Lunch Bunch membership (click on link)
  - In order to be a member, you have to pay dues!!
  - Trackers -
    - Giving qualified leads is the goal - see tracking sheet
    - 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.

## NEXT WEEK'S MEETING:

Thursday, May 16, 2019 @ 11:30 @ Tuscany Tavern