

LUNCH BUNCH 12/5/19

<http://leads3.org/>

Tuscany Tavern 12/5/19 @ 11:30 am

MEMBERS (attendees first names are in bold and underlined)

1. **Sheree Teller** - Owner, [StoryTeller 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. [Tammy](#) Carroll - Assistant VP/Branch Manager, [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. [Will](#) Traylor - Sales Management, [Action Axiom](#)
15. **Janice Kaup** - Professional Organizer, [Clutterbug of Colorado](#)
16. [Tricia](#) Bass - Professional Home Stager, [Tricia Bass Beautiful Spaces](#)
17. [Lori](#) Milhollan - Relocation Specialist, [Armstrong Relocation & Companies](#)
18. [Joshua](#) Smith - Owner, [ToMMTV Colorado](#)
19. **Greg Ahern** - Founder & President, [Ometrics](#)
20. [Andrew](#) Stevens - Travel Advisor, [Expert Adventures](#)

GUEST!!

- ❖ **Wendy Wagner** - Innkeeper, [Bears Inn](#)
- ❖ **William Reslock** - Architect, [Reslock and Sullivan, LLC](#)

NOTES

- Upcoming long presentations:
 - Dec 19 - [Arlene Burgess](#)
 - Presentation today by Tara Cox
 - Conduit for change - Evergreen Massage helps people change for the better

- 6 therapists - the Power Team - 45+ combined years of experience including medical and psychology, longevity in the team, Tara pays therapists well, does mindfulness training with therapists
 - Can book a massage the day of but try to book early during Nov and Dec
 - Ashiatsu, therapeutic, myofascial, stretching
 - Volunteers at Elk Meadow to do massages
 - Large treatment rooms
 - Keep it simple - no bells and whistles. CBD is the only add-on.
 - No receptionist so therapists do that now but when they are all busy, there is no one to man the front desk - suggestions given by the group
 - Discounts for military, seniors, disabled, first responders
- Networking groups to know about:
 - [Alignable](#) recommendations
 - [Fri Afternoon Club meetup](#)
 - [Serenity Schmoozer](#) - look on Facebook for postings on what appears to be a monthly event
 - [Network After Work](#) if you're looking to expand your business contacts down the hill
- ★ The [Jefferson County BRC](#) has many [programs](#) and [resources](#) to help you with your business.

MEMBER UPDATES

1. Sheree Teller - helps small- to medium-sized business with social media as well as Google My Business. Cindy gave Sheree a lead and Sheree is already working with this person. Sheree referred Tricia the other day. Sheree is nominated for New Business of the Year!

2. Charles Holman - lasers are now being used instead of needles, general practitioner with a focus on allergies, works a lot on pain, increasing absorption of vitamins & minerals and rehab, acupuncture for animals

3. Holly Worley - specialize in helping people make the transition in buying a new home & selling their home, advocate for her clients, lifelong relationships. Tara referred people to her recently and they were very happy with Holly!

4. Bob Campbell -

5. *Cindy Alvarez* - is nominated for People's Choice!

6. *Lisa Marie Schwartz* - wholesale mortgage, there isn't anything she can't do as far as home loans, 30 year fixed is at a very low rate, one of her lenders is waiving PMI and the 25% down for condos. Holly referred Lisa Marie to someone looking to buy.

7. *Tara Cox* - will be presenting - see notes above. Is nominated for Young Professional of the Year!

8. *Suzanne Levy* - wellness is a very big umbrella, working with a lot of different clients on stress management, professional development. Her philosophy - if we're doing well in our professional life but personal life is a mess (or vice versa) we're probably not doing as well as we can. Working in leadership development.

9. *Tammy Carroll* -

10. *Arlene Burgess* -

11. *Russell Hammond* -

12. *Rosa Julian* -

13. *Pam Pagliai* -

14. *Will Traylor* -

15. *Janice Kaup* - CoC has the utmost of integrity by honoring clients' home, office space and possessions by keeping strict confidentiality. A small town has many perks and one of those is living in a community in which people do not fear being shamed or judged but rather they are treated with dignity and have hope that they can truly make room in their lives for what really matters. Is nominated for People's Choice!

16. *Tricia Bass* - is nominated for People's Choice!

17. *Lori Milhollan* -

18. *Josh Smith* -

19. *Greg Ahern* - specialize in having people who visit your website fill out forms, e-commerce. If you want to get more leads or sales on your website - contact Greg

20. *Andrew Stevens* -

GUEST! Wendy Wagner - open house this Sat 11-3, snacks, drawing for free nights' stay

GUEST! William Reslock - operating the business for 15+ years doing mostly residences, additions, renovations, trying to grow business in the mountains, focus is aging in place.. Wife is Urban Planner and writes about aging issues.

Lunch Bunch business:

- **DATE CHANGES:** Our upcoming meetings will be Dec 19 @ Wild Game (Sheree will make arrangements) and Jan 9 @ Tuscan Tavern. **1/9/20 will be the first meeting in January and then every 2 weeks after that**
- **Sparkle and Shine** - VOTE!! Date of event is Dec 12 from 5:30 pm - 9:00 pm @ Wild Game. Tell Sheree if you can go so Lunch Bunch can have a table. Holly, Tara, Charles, Sheree, Lisa Marie, Suzanne are going.
- ***Dec Happy Hour at Charles' house!!*** Dec 8th, this Sun, brunch at 11:00 am.
 - Address is 3951 South Skyline Drive Evergreen, CO 80439. 3.2 miles off Upper Bear Creek Rd. then take a right on South Skyline
 - Park in the driveway or on the road or at the top of the road which is one house above Charles
 - Spouses welcome, please no kids nor pets :)
 - If you can attend and bring a spouse or significant other, please let Janice know by tomorrow at noon.
- Goals, objectives, thoughts on how to make LB better in 2020:
 - Keep to a stricter time schedule by having an agenda
 - Build in time during meetings to meet 1-on-1 or in small groups every now and then - speed networking
 - Streamline notes - info we really want to capture
 - Everyone come up with one thing or insight or something that worked well for you in your business
 - Go around to each person and talk about our business needs
- Change of venue quarterly:
 - We can have Wild Game Fireplace room for free if we want it for Lunch Bunch meetings. Group agreed to go to a different Chamber restaurant once per quarter.
- Treasurer's Report - \$40 for year dues. Make checks payable to: Lunch Bunch Leads Group of Evergreen. Sheree will give those who owe an invoice.
- Chamber business:
 - Upcoming Chamber **events** with **sponsorship opportunities:**

- [Skate the Lake](#) - Dec 31 6:00 pm - 10:00 pm @ Evergreen Lake House
 - [In It Together](#) - at the end of the Monthly Breakfast - break out into small groups to talk about things going on in their businesses and usually a board member will be in those small groups
 - [Task force groups](#) - coming up with new ideas for the Chamber to give a lot of value to businesses
 - [Next year](#) is the 50th anniversary of the Chamber!!
- [Policy](#) for Lunch Bunch membership
 - 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, Dec 19, 2019 @ 11:30 @ Wild Game