

LUNCH BUNCH 12/19/19

<http://leads3.org/>

Wild Game 12/19/19 @ 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](#)

NOTES

- Upcoming long presentations: **Charles Holman is scheduled for 1/9**
 - **Networking groups to know about:**
 - [Alignable](#) recommendations
 - [Fri Afternoon Club meetup](#)
 - [Serenity Schmooser](#) - 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* -

2. *Charles Holman* - seminars to veterinarians in 2020. Proactive vs. complacency - the longer you've had some issue, the longer it takes to get rid of it (in general). LEARN about your imbalances and try to use the least invasive process to balance your body.

3. *Holly Worley* - selling people's homes and putting people in their new homes. Google reviews have helped Holly and she appreciates us doing that. Let's review on Facebook as well and she will send an email to everyone. Is a relocation specialist and BRG (works with federal employees), CMAS certified (mountain certified). GRI is a general real estate certification that Holly would like to get in 2020 as a formality as she is already doing that work. Holly is doing a presentation on Jan 15 and will send us info about that.

4. *Bob Campbell* -

5. *Cindy Alvarez* -

6. *Lisa Marie Schwartz* - wholesale mortgage broker (sells directly back to Freddie Mac, etc.) and cuts out the retail middleman. Rates are about .375% less than retail and usually have 0 closing costs. 100% referral-based.

7. *Tara Cox* -

8. *Suzanne Levy* - Can use more Google reviews so she will send a reminder to all. Works with mid-level managers at a Fortune 500 company and has been getting clients from that. Has entered into an agreement with another company in 2020 that offers health coaching to Fortune 500 companies. We're living a lot longer but we're not necessarily living a better life. Preventing disease is more sustainable than waiting until something goes really wrong. Functional medicine health centers are the wave of the future. Research says in order to age well one has to exercise and stay engaged with others.

9. *Tammy Carroll* -

10. *Arlene Burgess* -

11. *Russell Hammond* -

12. *Rosa Julian* -

13. *Pam Pagliai* -

14. *Will Traylor* -

15. *Janice Kaup* - refer to folks in residential and commercial in Evergreen/Conifer area. Make room in your life for what really matters. No packing for moving but can do unpacking as that is under the organizing umbrella.

16. *Tricia Bass* - gets homes ready camera-friendly and moving-ready. Has a degree in Fine Arts Photography and is a painter. She has an eye for making things look beautiful. Works with many realtors for clients who are moving and want more money for their home sale.

17. *Lori Milhollan* -

18. *Josh Smith* - installed 6 TVs recently to get more exposure in a few restaurants like Lariat. Charles' business is represented by Josh and Charles is very happy with the commercial. Getting more locations and his goal for 2020 is to get one new location each month. Handed out new, re-designed flyer. Adding a QR code to each TV for customers to scan those which will take them to his website which goes to his client's websites.

19. *Greg Ahern* - conversion acquisition using tools like pop-up, mobile banners, chatbot. Consulting looks at analytics. Depending on what page the potential customer is on, your chatbot can pop up with relevant questions as well as videos and texts as a way to engage with and help potential customers. Chatbots do all of these functionalities: support, lead generation and e-commerce. Targeting marketplaces like Shopify for 2020 for sales. Tools are free and he offers 3 different plans that cost from \$80-\$500/month depending on the plan you choose. Consulting is from \$1000-\$3000/month.

20. *Andrew Stevens* -

- Lunch Bunch business:
 - **DATE CHANGES:** 1/9/20 will be the first meeting in January and then every 2 weeks after that
 - Treasurer's Report -
 - \$41.50/year dues if paying through leads3.org.
 - \$40.00/year dues if paying by check.
 - Make checks payable to: Lunch Bunch Leads Group of Evergreen. Sheree emailed invoices this week.
- Chamber business:
 - Upcoming Chamber [events](#) with [sponsorship opportunities](#):
 - [Skate the Lake](#) - Dec 31 6:00 pm - 10:00 pm which will be part of downtown and the lake area - it will be more of a street festival b/c the lake will not be skate-able.
- [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 MEETING:

Thursday, Jan 9, 2020 @ 11:30 @ Tuscany Tavern