

From: [Stephanie Teague](#)
To: [Becky Miller Real Estate Lead Share Piedmont Fine Properties](#); [Caitlin Adkins](#); [Dennis Donovan Bowman Gaskins Financial Group](#); [Dennis Reitz Golden Rule Builders](#); [Thomas Nicolai](#); [Fatima Attai](#); [Jan Sutton Sutton Insurance](#); [John Frazer & Mary Brown & Bigelow](#); [Judd Walls Constant Water](#); [Laurie Bersack & Joe IBDJ](#); [Lisa Berkema Piedmont Dispute Resolution Center](#); [Noah Portugal NJP Accounting](#); [Paul Klinger Tuesday Lead Share Chamber Of Commerce](#); [Scott Bricker Lead Share](#); [AT&T](#); [erin@countysidetitle.com](#); [mcoffin@infinitexco.com](#); [Benjamin Musser](#); [Alec Burnett](#)
Subject: Dec 17 Lead Share Meeting Overview
Date: Tuesday, December 17, 2024 11:50:31 AM

Meeting Start (00:00 - 09:00)

- Time: Around 8 o'clock
- Dennis Donovan not present yet, expected soon
- Packed agenda and food available

Treasury Update

- Account balance: \$1804.96
- No early payments received
 - A check received for this year
- Previous balance at the beginning of the year: approximately \$2300
 - Difference of about \$606 to \$700 due to events and sponsorships

Secretary's Report

- Minutes from last week mailed and emailed to everyone
 - Some members may need to check spam for emails
- Discussion on updating email list for better communication

Elections

- Positions discussed: Treasurer, Secretary, Vice President, President
- Stephanie moves from Vice President to Secretary
 - "All in favor of Stephanie retaining or moving to the position of secretary? Say resounding."
- Becky nominated for Vice President
 - Responsibilities include scheduling presenters
- Paul remains as President for another year
- Noah continues as Treasurer for one more year

Lead Chair Meeting

- Recent meeting with Alex and Benjamin regarding Lead Chair
 - Attendees included Stephanie, Judson, Laura
- Focus on the relationship between Lead Chair and the Chamber
 - Discussion on growth and effectiveness of current strategies

Lead Generation Overview (09:00 - 19:00)

- Number of leads from the web portal:
 - Eight leads total.
 - Zero leads on Wednesday, Thursday, and Friday.
 - Seven leads on another unspecified day.
- Acknowledgment of being number one in lead generation by Benjamin.

Concerns About the Web Portal

- The web platform is not effectively capturing leads.
- Discussion on whether to:
 - Emphasize paper leads.
 - Retrain on using the web portal.
 - Explore alternative methods for lead tracking.

Lead Sharing Process

- Issues with confidentiality and privacy in lead sharing.
- Importance of capturing client information for follow-up.
- Online system does not facilitate lead sharing effectively.

Group Dynamics and Lead Sharing

- Some members are in multiple lead share groups.
- Discussion on loyalty and lead allocation among different groups.
- Importance of capturing leads during meetings for accountability.

Proposed Solutions

- Use of lead share sheets during meetings:
 - Sheets can be passed around for members to record leads.
 - Facilitates one-on-one conversations about leads.
- Consideration of financial incentives for lead sharing:

- Previous contests for passing leads were mentioned.
- Importance of tracking leads for group performance.

Administrative Roles

- Discussion on the role of the secretary in lead recording.
- Suggestion to print more lead share sheets for meetings.
- Dennis Donovan volunteered for a role related to lead tracking.

Lead Tracking (19:00 - 29:00)

- Dennis will be responsible for tracking leads.
 - He will vet unqualified or insufficient leads.
- When sending a lead, mention if it's urgent.
- A designated time will be set for lead tracking.

Meetings and Holidays

- Meetings cannot be held on Tuesdays if a holiday falls on a Thursday.
- Other groups have more flexibility regarding holiday meetings.
- The calendar for 2025 will be reviewed to assess which holidays to skip.

Meeting Locations

- Consider having meetings at different locations in 2025.
 - Some meetings can be held at local businesses.
- The PATH foundation will remain the home base.

New Members Meetings

- A presence should be maintained at new members meetings.
- New member meetings will occur every other month, totaling six meetings.
- The goal is to increase attendance at these meetings.

Newsletter Discussion

- Discussion on the frequency and content of the newsletter.

Consider a monthly or quarterly newsletter.

- The lead share newsletter will be distributed to all members and the public.

New Guests and Introductions (29:00 - 39:00)

- New guests include Zach Marsh from FX Payroll.
 - Excited to travel home to upstate New York to see family.
- Caitlyn Atkins owns Spaces Organized and Styled.
 - Introduced her new assistant organizer, Kelsey.
- Dennis Wrights from Golden Rule Builders.
 - Looking forward to having children back in the area for Christmas.
- Stephanie Teague with Beamer.
 - Attending granddaughter's preschool Christmas program.

Family and Holiday Plans

- Judd Walls from Constant Water.
 - Family gathering for Christmas with sons and their fiancées.
- Becky Miller from Piedmont Pine Properties.
 - Busy week with children's social events and looking forward to a beach trip.
- Noah Portugal from JP Accounting.
 - Planning a secluded cabin stay in Shenandoah before tax season.

Events and Activities

- Caitlyn's breath work session scheduled for tomorrow.
 - Last session for 2024.
- Professional development book club planning meeting on the 20th.
 - Attendees encouraged to bring book suggestions for next year.

Personal Updates (39:00 - 45:00)

- Scott Bricker from Orcator Media
 - Excited to see siblings and their kids at mom's house.
 - Family tradition of Italian themed Christmas.
 - Transitioned from spaghetti to various types of pasta, including lasagna and tiramisu.
- Dennis Donovan from Bowie Gaskins Financial Group
 - Achieved weight loss goal and got a new haircut.
 - Family coming from Detroit for the weekend.

Business Discussion

- Next meeting scheduled for January 7th.
- Presentation schedule
 - Noah will present in March due to tax season conflicts.
 - Stephanie and another member will organize the presentation list.

Family and Celebrations

- Dr. Tom Nick Leiphal, local family chiropractor
 - Excited for daughter and her boyfriend's visit while dog-sitting.
- Discussion about family surprises
 - Ornament gifts for Christmas with fun messages.
 - Mention of future baby announcements and the joy of grandparenting.

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