Legacy Team Schedule 2017

January – hosted by Jeanne Salcetti

February – hosted by Tom Lachocki

March – hosted by Lain Chappell

April – hosted by Trent Urban

May – event in Denver; separate meeting hosted by Tom Lachocki

June – hosted by Susan Wilklow

Events July Through December 2017

July 20th – Bruce Ashley at 5527 N Union Blvd

August 17th - Margi Bellingham at 4775 Granby Cir

September 21st – Jeff Kronlage – 7660 Goddard St, Ste 202

October 6-8th Retreat

November 16th - Steve Fleming – location TBD

December 21st - Vern?

Hosting locations if needed:

Tom's office:

4775 Granby Cir, 80919

Susan's office:

5527 N Union Blvd, Ste 100, 80918

Trent's office:

6395 E Platte Ave, 80915

Legacy Group Contact List

Name	Email	Business Name	Business Phone	Cell Phone
Bruce Ashley	bashley@integrityweldfab.com	Integrity Welding & Fabrication, Inc	719-597-5784	719-337-6298
Margi Bellingham	margi@thelawnsmith.com	The Lawnsmith, Inc	719-495-4491	719-499-8874
Lain Chappell	Lain@solidrockcustomhomes.com	Solid Rock Custom Homes	719-494-0932	719-964-6352
Bart Combs	bart.combs@solkoa.com	Solkoa	719-634-1687	719-360-1537
Steve Fleming	sfleming@rams-pro.com	Alpine Technology Corporation	719-623-5332	719-338-8903
Mike Danforth	miked@mtdresearch.com	MTD Research	800-320-7507 x 21	719-359-0068
Jeff Kronlage	JKronlage@crossconnect.com	Cross Connect	719-351-2005	719-330-8725
Tom Lachocki	tom.lachocki@nspf.org	National Swimming Pool Foundation & Genesis	719-540-9119	719-492-6604
Vern Plant	vern@planteci.com	Plant Engineering Consultants, Inc	719-473-7077	719-351-2005
Jeanne Salcetti	jeannesalcetti@hotmail.com	Salcetti & Associates	719-594-0091	719-963-6040
Trent Urban	turban@thewirenut.com	The Wirenut	719-227-0050	719-491-2899
Susan Wilklow	susan@wilklowassociates.com	Wilklow & Associates, CPA	719-260-0320	719-331-8442

Largest Decision or Changes w/I 1-2 years

- Tom: Launch Sponsorship Business Unit, Satellite Delivery of Training
- Bruce: Move Business, Possible merger, buyout, or ??
- Lain: New Office & Parade of Homes 2018
- Vern: Leadership or Ownership Transition, Branch Office in Texas
- Trent: In House School to train new employees, Growth, Acquisition, Franchise, or Sell?
- Susan: Growth at what rate and how much
- Jeanne: Bringing on an Associate
- Margi: Improve profitability and prepare business for transition or sale (based on Tiger Team)
- Steve:
- Jeff: How to create an effective sales team to grow the organization
- Mike: Figure out his number to retire
- Bart: How to approach the business if I get Rucker. How to approach the business if I don't get Rucker.

Guiding principles moving forward:

- We will rotate host responsibilities with the host also acting as the facilitator
- We will meet on the Third Thursday of the month. However, we will shift our time to start at lunch adjourning at 4:00 – 5:00 for a social time
- We will work to have 12-16 members who do not compete. We will resolve the interview and indoctrination process. (TBD: Non-competitors, Veto of Current Members,…)
- Each month, Legacy Group Members will meet in pairs to hold reciprocal one-2-one meetings
- We will further explore invited speakers or consultants to address some of the 1-2 year decisions/changes we anticipate for the group.
- We will continue to refine our process and consider if at a future date if we invest in an administrator to help with the meeting.
- What happens at Legacy stays at Legacy
- We will cover annual business and personal goals at the October retreat
- Hosts will give a financial overview during their host meeting

*Text **~~Strikethru~~** added to all completed meetings*

~~Legacy Meeting: July 20, 2017~~

~~**Attendance:** Bruce, Lain, Mike, Bart, Margi, Jeff, Jeanne, Tom~~

~~**Possible Agenda Items:**~~

- ~~Individual Check In~~
- ~~Fill in Missing "Largest Decision & Changes" Anticipated~~
- ~~Update Personal Last Will, Medical Power of Attorney, Power of Attorney~~
- ~~Update on Margi's Tiger Team~~
- ~~New-member Review Process to Join Legacy~~
- ~~Schedule 121s~~
- ~~Financials Review - When?~~
- ~~Annual Objectives~~

~~**Issues Processed:**~~

- ~~Jeff - Better sales process and/or reputable sales coach~~
- ~~Lain - Revealing cost information to third party project auditor~~
- ~~Bruce - Move update & Host financial review~~
- ~~All - Estate planning including exchanged contacts for planners~~

~~**One2One schedule: July 2017**~~

- ~~Jeff/Steve~~
- ~~Margi/Tom~~
- ~~Bruce/Lain~~
- ~~Bart/Mike~~
- ~~Jeanne/Susan~~
- ~~Vern/Trent~~

~~**My One Thing July 20, 2017**~~

- ~~Lain: Forewarn Stephanie and let Dee know that Solid Rock will not release cost information~~
- ~~Jeanne: Contact Debbie Wilson to transfer Legacy Retreat reservations~~

Legacy Meeting: August 17, 2017

Attendance: Jeff, Steve, Margi, Tom, Bruce, Lain, Bart, Mike, Jeanne, Susan, Vern & Trent (12/12); Margi host; NSPF Location

Possible Agenda Items:

- Individual Check In & soccer ball question
- Confirm 121s from last month Schedule 121s

One2One schedule: July 2017

- Jeff/Steve
- Margi/Tom
- Bruce/Lain
- Bart/Mike
- Jeanne/Susan
- Vern/Trent

Issues Processed:

- Update - Anyone update their Personal Last Will, Medical Power of Attorney, Power of Attorney
- Retreat Update - Vern
- Update on LawnSmith Tiger Team & Host financial review (Margi)
- Business Transition (Bruce & Mike)
- Lessons about hiring a lot of staff at once (Vern)
- How to deal with a negative social media review (All)

My One Thing July 20, 2017

-

Legacy Meeting: September 21st

Attendance:

Location: Jeff Kronlage – 7660 Goddard St, Ste 202

Possible Agenda Items:

- Steve update on sales plan implementation
- Lessons learned as we updated our Customer Relationship Management (CRM) or IT Systems
- Confirm 121s from last month Schedule 121s
- Lessons learned about buying facility/property and renting it to one's business
- Update - Anyone update their Personal Last Will, Medical Power of Attorney, Power of Attorney
- Retreat Update - Jeanne

One2One schedule: August/September 2017

- Lain/Tom
- Trent/Jeanne
- Bruce/Mike
- Steve/Bart
- Margi/Jeff
- Vern/Susan

Issues Processed:

- —
- —

My One Thing July 20, 2017

- —

Legacy Meeting: October Retreat

Attendance:

Location: Jeff Kronlage – 7660 Goddard St, Ste 202

Possible Agenda Items:

-

One2One schedule: August/September 2017

- Lain/Tom
- Trent/Jeanne
- Bruce/Mike
- Steve/Bart
- Margi/Jeff
- Vern/Susan

Issues Processed:

- Ongoing Legacy Organization (franchise idea)
-

My One Thing

-

Legacy Meeting: November 16th

Attendance: Steve, Jeanne, Tom,

Location: Steve Fleming - NSPF Facility, 4775 Granby Circle

Possible Agenda Items:

- **Always:** Assign a Timer
- **Always:** Assign and get a Quotarian report
- **Always:** Meeting Recap: what went well, what would we change, what score for the meeting (1-10)
- **Always:** Confirm 121s from last month. Schedule 121s for next month
- **Always:** Host documents issues processed, 121s, and my one thing
- Steve update on sales plan implementation
- Lessons learned as we updated our Customer Relationship Management (CRM) or IT Systems
- Update - Anyone update their Personal Last Will, Medical Power of Attorney, Power of Attorney
- Review plan forward for Legacy (possible franchise-ability)
- Review questions posed to Lain by Steve Drury (TAB)
    a. What has been the greatest benefit derived from being on a peer board of advisors?
    b. What about the peer board has helped you the most?
    c. What value was derived from having a professional facilitator?
    d. How will you keep each other accountable to your goals?
    e. What will be required to ensure the group stays together, that the meetings are succinct and focused, and that there is a high degree of solutioning on the issues brought before the board?
- SLACK Training by Mike Danforth
- Brian Beaulieu information should have been sent to the team
- Commit for each of us to view a Ted Talks on a specific Topic area and recommend which ones the team should view together and discuss
- Annual Goals for 2018
- Lain share social style training & big-shot training take home lessons
- Ideas on speakers for future meetings
- Lachocki Succession Plan

Typical Agenda:

Assign Quotarian

Assign Timer: Timer solicits time per issue
Team check in (4 minutes each). Include description of your issue
Team decides which issues top process today
Process Issues
Host presentation:
Closing administration:

- Provide meeting admin feedback: Did well, Do Differently, rating 1-10
- Confirm 121s,
- Confirm Quotes,
- Document “my one thing,”
- Confirm Next Month’s Host & Location

Issues Processed:

-
-

My One Thing prior to Next Meeting