THE SPOKES SPEAK - GEARED TO SERVICE

Rotary Club of the North Fork Valley

POB 1543, Paonia, CO 81428

WEB SITES: www.rotary.org www.rotary5470.org www.paoniarotary.org

Meeting Thursdays at Noon in the Paonia Town Hall

District 5470   **Club 1180 - Chartered 12/20/22**

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LAST MEETING: January 18, 2018

Club President James Schott presided over the meeting.
Thanks to members Mike Heck, Glen Dahlgren and Felix Belmont for setting up.

Announcements:
- Karri Polson announced openings for taking money for Basketball and Wrestling.
- Glen Dahlgren announced that he has 3 Don's Cards.
- Bob Lario announced that on the Super Bowl Chart there are 62 squares out of 100 sold so far.   We have only next Thursday, January 25th and the following Thursday, February 1st before the Super Bowl on Sunday, February 4th!! He would love to see the Rotarians pay for all 100 squares. Each square cost $5.00 and it's a random drawing. Half of the proceeds with go to the Club and half will go to the person who has the winning square—and the winnings cannot be donated back to the club.
- Sarah Bishop announced that on February 27th will be a presentation of her and Bill's trip to Peru! David Jacobson is helping her set it up so you won't want to miss it!!   The time was not announced.
- Bill Bishop said the one word describing their trip to Peru is "WOW"!

Birthdays & Anniversaries:
- Bill Bishop is 78 years young today—he said it happened sometime early this morning!

Happy Bucks:
- Bob Lario is happy that he's getting over his cold!!
- Bill Bishop is happy that he's 78 and nobody's beating him up (with spankings…..?)
- Francois Pretorius is happy that Bill is 78

No Ms. or Mr. "X" today.

No visitors or key guests.

PROGRAM: Happy Data
- Betsy Marston announced Annette Pretorius who has started a new business called" Happy Data" which she started last August   It is information management—strategies for taking naps in the afternoons. There are 6 people involved:

- ○ Annette Pretorius, Owner
- ○ Callie Hale, Bookkeeping
- ○ Moriah Rodstrom, Bookkeeping
- ○ Marcus Roeder, Business Strategy
- ○ Joe Chisholm, IT
- ○ Spencer Lightfoot, Marketing

- They help small businesses and non-profits track information to be more organized and help prioritize to be more efficient, have better planning and more consistency.   She explained that you can see deeper by identifying trends, questioning the facts and analyzing.   You can also take better risks, model impacts and see historical trends.   The process is a 3-part process: 1 – identify the goals; 2 – think it through and make a plan; and 3 – implement it. You can also identify KPI's or Key Performance Indicators. You can see more profit with more client referrals; try to prevent people from complaining and give customer satisfaction.   By measuring the KPI's you can see your profit – everything you do in business has to do with money; do customer surveys; view your quality, view your customer service by looking at complaints; and look at your outcomes via production records and event reports.
- Develop Procedures:
  - ○ Businesses:
    - ▪ what happens – look at your business model
    - ▪ Who will do what – where will the information go?
    - ▪ Orders get sent in
    - ▪ Open customer service case
  - ○ Non-Profits:
    - ▪ Fill out membership forms
    - ▪ Record it in the books
    - ▪ Attend events
    - ▪ Renew
  - ○ For Sales Order Process:
    - ▪ Adopt tools – what are the appropriate tools?
      - Good tools: enforce performance, increase efficiency and consolidate information
  - ○ Costs and Needs are considerations to keep in mind.
  - ○ There are different levels available:
    - ▪ Basic is free
    - ▪ Entry Level uses Excel spreadsheets and Google Apps (so some cost)
    - ▪ Mid-Level uses customer Software Solutions (costlier, but less than $1,000 per year)
    - ▪ Enterprise Level
  - ○ Implement Procedures:
    - ▪ Write detailed procedure manuals (focusing on the organization can be the hardest part)
  - ○ Review and Improve – are you achieving your goals? If not, why not?
  - ○ Dashboard is very helpful in developing great reports.
  - ○ There are lots of cheap tools: Google Suite, Square, Salesforce (expensive for businesses but zero for non-profits), MailChimp is a marketing tool, Facebook where you can target specifics, Freshbooks is an alternative for Quickbooks; and Canva.com is a graphic design program for professional flyers and web images in a snap!
  - ○ They do everything—they help with whatever your needs are.
  - ○ They do work out of the valley also: they have a contract in Oregon and a subcontract in Texas.
  - ○ Non-profits are much more budget-oriented and business are more cash-flow oriented.
  - ○ They charge by the hour but it also depends on the project(s).

- Annette said that her Dad, Francois, made her so smart and James said The Blue Sage trained her.

Remember to feed the polio jar. <u>Also, pay your dues.</u>

UPCOMING MEETINGS:
Jan. 25 - To Be Announced.
Feb. 1 - To Be Announced.