

From: [Angi Roberts, Peninsula Executives Association \(PEA\), Executive Director](#)
To: leads-committee@executives.org
Cc: ["Deanne Belcher"](#)
Subject: PEA Leads Committee Update
Date: Thursday, July 16, 2020 1:48:37 PM
Attachments: [20190502 PEA Actioni Allies.pdf](#)
[20190502 PEA Actioni Allies.xlsx](#)
[pea-getting-to-know-you.pdf](#)
[Introduction-to-Action-Allies.docx](#)
Importance: High

Hi everyone!

Thanks for all your great ideas from the last committee meeting! I wanted to let you know that the Board and I have been working on the upcoming business meeting schedule and we've adopted a lot of what you worked on together as a committee.

Before I give you some more info about today and the next six weeks or so, I wanted to pass on Homer's email again from last fiscal year with the attachments. The intro doc is the original survey that the Leads Committee had asked the membership to complete at a meeting. Action Allies, which was an initiative that the Leads Committee developed, has not met since then. Please let me know if you'd like to re-establish this program and I will work with you on a calendar date. Thanks!

So, today was the first implementation of your ideas from the last committee meeting with the breakout room participants each answering the question: How can we generate business for ourselves and each other through Zoom? We are working on the timing so that we can still fit in the group feedback and sharing after zoom rooms, since I'm sure there were lots of valuable tips shared in the individual rooms. Next time! However, we will start next time with a backup plan of asking members to share with the all of us in the chat box on zoom their feedback from their room's conversations, and then the office can share with everyone the chat notes after the meeting...more value to our members because of PEA—the value of ALL of the ideas rather than just the people in the one zoom room (or at the one table, if we were meeting face-to-face).

Here are some future meeting agendas to give you an idea of the continuing implementation of your committee's ideas. With each of these activities, usually there is also a Classification Talk, except for August 20, when we'd like the Leads Committee to work with me and host.

July 23:

- Group Zoom Room Meetings Activity ~ Random Networking Rooms answering the question:
How has COVID-19 changed your business? Has it changed the kind of leads you now want?

July 30:

- Leads & Introductions: hosted by a member of the Leads Committee. Please let me know who that person will be.

August 6

- Group Zoom Room Meetings Activity ~ Random Networking Rooms answering the question:
What is the usefulness of recording our leads given, as long as we give leads to each other? Is the process of recording leads in a virtual environment working for everyone?

August 13 ~ Special Meeting

- Program Committee Special Program: they will have most of the meeting time for their program, so there will not be a group activity

August 20

- Group Zoom Room Meetings Activity ~ 2 rounds, 2 different rooms for each attendee: *Getting to Know You*, hosted by the Leads Committee (I will continue to run zoom software): attached is the last list of questions that we used for this activity. Please let me know if you'd like to continue with that list or if you have another one that you'd like me to use.
- Larger Group Sharing, Member feedback, new things learned about each other (i.e., 1 interesting fact learned today). A Leads Committee member would be the facilitator of the member feedback session to keep it moving and get queues of when the conversation has stopped and we need to move on (or we've run out of time).

As I said, all of these topics have been approved by the Board, so we can working on this right away! So exciting!! Feel free to continue coming up with great ideas—it's so awesome to see so much happening so quickly!

And also please let me know what your thoughts are on the schedule and if you would like to volunteer as the Leads Committee host for:

1. **July 23:** facilitate group sharing: 1 person starts with what went on in their room and then asks for another person to go next and share what went on in their room. Leads host ensures that it keeps moving so we can get through all of the rooms (there are usually 7-8 rooms).
2. **July 30:** host volunteer from Leads Committee for Leads & Introductions
3. **August 6:** facilitate group sharing as above for July 23
4. **August 20:** facilitate group sharing as above for July 23; can be two people; each round is approximately 25 minutes and group sharing is about ten minutes, so people have to be brief!

Thanks again for all that you did at the last meeting. I'm looking forward to implementing these changes. Please let me know how I can help you and what you need to make this committee successful. I'm here for you!

And, remember, you can just use the email leads-committee@executives.org to reach everyone on the committee.

Warmly,
Angi

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From: Homer Jamison <homer@network-focus.com>
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Subject: PEA Action Allies survey from 5/2/2019 meeting

I tabulated the results of our survey form on in the attached files. For anyone who is agile with Excel, I've included that format so you can sort and slice and dice to view the results in any meaningful way.

Here is how I collected the data:

- Everyone whose form I received in highlighted in yellow. Those without highlights weren't there or I didn't get their form.
- The 1st choice is marked with a bold "X" in the corresponding column.
- The 2nd choice, if any, is marked with a "+" in the corresponding column. Those who listed more than one 2nd choice are also market that way.
- Write-in comments are on the right. I paraphrased some of them, trying to capture the essence of the comments.

Now that we have the data, I think we should meet to discuss what it means and how we can use it to the greatest benefit to PEA. Please reply to all with your thoughts and any early conclusions from seeing this data.

Thanks, Homer

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