



# Newsletter

**August 24, 2023**

Meeting: Jeff Dorrance, President

Greeter:

[mycdbl.com](http://mycdbl.com)

## **MISSION STATEMENT**

*Capital District Business Leaders enhance the growth of members' businesses by providing a forum for the exchange of business leads, products, and services. Our name represents excellence and respect for our clients, community and professions. We are committed to contributing back to the community.*

## **VISITORS/ALTERNATES**

## **ANNOUNCEMENTS**

**Ann MacAffer** of CBRE announced that her office has officially merged with other CBRE offices and are under one ownership. The story was published recently in the Business Review.

Ann also met a magician at a recent networking event who expressed interest in joining CDBL.

**Mike Corey** of LeChase Construction announced that he was interviewed about LeChase's participation along with Hope 7 and George to the Rescue to do renovations at a Troy community Center. The story was featured on the NBC show on Sept. 23.

**Jeff Dorrance** of Premium Mortgage Corp. talked about last week's board meeting, in which dues were discussed. No decisions have been made on dues increases as yet and it will be considered further at the next board meeting.

**John Hall** of CPL Architects announced that they have started work on a police and court building project in Skaneateles.

**Terry Freeman** of 1st National Bank of Scotia announced that as part of its 100th anniversary celebration, the bank gave a total of \$20,000 to local charities, including Things of My Very Own (\$10,000) Joan Nicole Prince Home (\$5,000) and Community Caregivers, Boys & Girls Clubs and the Veterans Trust Fund (\$2,000 each).

**Ann MacAffer** has a 200,000 sf building available in Green Island.

## **GOOD NEWS**

**Andy O'Reilly** of Securitas is on the board of a therapeutic horse association that helps out veterans. Next Thursday they will be taking a veteran to Saratoga.

**Joff Dorrance** reports that it has been a good month for loan applications.

## **WISH LIST**

**Jeff Dorrance** is looking for people looking for preapprovals or mortgages.

**Alan Baker** of Creative Marketing Concepts is looking for businesses that will be shopping for holiday or thank you gifts for their clients.

**Mike Corey** is looking for ideas for a fun event for 30 to 50 people.

## **THANK YOUS**

Alan Baker to Terry Freeman

Terry Freeman to Alan Baker

Mike Corey to Ann MacAffer, Patsy Immediato

Jordan Modiano to Glenn Coyne

Terry Hamlin to Frank Paladino

Walter Guiles to Frank Paladino

## **COMMITTEE REPORTS**

### **Treasurer's Report – Nick Marchese**

No report.

### **Leads – Frank Paladino**

Lead of the Week - **Rob Singleton**

### **Special Events –Will Berglund**

No report - Will is working on our next event, possible to see Jordan Modiano's race.

### **Membership – Josh Jennings**

No new membership applications have been received. Bryan Mueller has reached out to Alan Baker regarding rejoining. Josh Jennings will follow up with Bryan.

Jeff Dorrance reminded members that visitors are welcome to attend meetings, but be mindful of possible conflicts with other members. If in doubt, check with Josh.

### **Speakers/Greeters – Alan Baker**

*Contact Alan to sign up for open speaking and greeting dates for the 3rd quarter.*

Please help to fill in the schedule by signing up to speak or suggesting a guest speaker.

### **2023 Schedule:**

#### **3rd Quarter**

August 31st – NO MEETING

September 7th – DONATION PRESENTATION / Greeter - Ann MacAffer

September 14th – Chuck Shank, Need Greeter

September 21st – Greg Royer for John Hall - Need Greeter

September 28th – Alan Baker - Need Greeter

### **Social Media – Nancy McKiernan**

If you are active on social media, please like, share and comment on the weekly LinkedIn and Facebook posts featuring the week's presenter. Also check the CDBL website calendar for updates on networking events.

<https://www.facebook.com/CapitalDistrictBusinessLeaders?mibextid=ZbWKwL>

<https://www.linkedin.com/company/cdbl---capital-district-business-leaders/>

## **CDBL OPEN CATEGORIES**

Caterer  
Chiropractor  
Event Planner  
Florist  
Interior Designer  
Jeweler  
Limousine Service  
Long Term Care  
Public Relations  
Sign Company  
Title Insurance Company  
Travel Agency  
Water or Coffee Vendor  
Web Designer

## **TODAY'S SPEAKER**

### **Continuation of Last Week's Topic - Horrors and Successes**

**Alan Baker** attributed many of his success stories to his good relationships with his suppliers. Alan takes steps during processing all orders to mitigate any problems. An example of this is getting a proof for every job, even if it's a reorder, to catch possible errors.

**Rob Singleton** of Paychex joined his team 18 months ago and now is the most experienced person on the team. He has been asked to mentor new employees and was voted MVP.

**Terry Hamlin** had a client at First Data whose credit card machines were not working. Terry found that a clerk had purged a list of accounts from the system by mistake. Terry was able to get the accounts back up.

Terry had success when his boss turned the Jersey Mike Subs account over to him. This led to Terry getting all the Moe's and related restaurant business accounts.

**Walter Guiles** of TechBridge does a lot of work in the hospitality industry. He often has to "close the gap" between two pieces of a project, for example the hotel key card and the technology behind it. Sometimes it becomes a horror story.

Walter attributes his success in winning deals to being a handshake kind of guy.

**Terry Freeman** of 1st National Bank of Scotia had horror stories about dealing with upset customers that do not like to be told "no". She sometimes has to bend the rules to make the customer happy.

Terry also had success stories about getting clients to switch from their larger bank to a smaller community bank.

**Patsy Immediato** of Classic Custom Construction has been in the business for 24 years and has met a lot of great people. She helps people build their dreams. Recently a house was featured in the Business Journal because it sold for the city's highest price. 30 Marion Ave. Albany was a house that Patsy had renovated 17 years ago.

**Mike Corey** of LeChase focuses on areas of improvement. He has developed best practices for responding to a RFP which include interview preparation, being very specific, knowing the client and knowing what advantages you bring to the table. Mike has been asked to share these best practices with other staff at LeChase.

**Davis Moeckel** of CRR Wealth Management had a horror story about a client who had had an account with a different financial advisor for 30 years. The advisor made changes to the client's portfolio which resulted in a loss of 35% of his retirement account.

Davis recounted success stories involving clients who came to him with a lot of debt. Davis has been able to provide these people with a financial plan which has resulted in them becoming millionaires.

**50-50 – Walter Guiles - No Joker**

Collected: \$21 Jackpot = \$138.00

**ATTENDANCE (23 Members)**

**Members (14), Alternates (-), Guests (-)**

**Total Attendance (14)**