

TIM AND GWEN MINUTES

what we agreed

TUESDAY, OCTOBER 6TH, 2026 · 3:00 TO 4:00 P.M. CENTRAL · ZOOM

PRESENT: TIM KAUFELDT, COO, GWEN DIEDE

Ten decisions from this afternoon's call and the actions that came with them, taken from the call recording.

DECISIONS

- 01 **LinkedIn Premium waits.** It turns on once DCA is back in a sales posture.
- 02 **X Premium is a go, at \$8 a month.** The basic tier, for its Grok features. Gwen sends Dawn a short note on it and asks which card to use.
- 03 **The patient story release is updated.** "Copied" now reads "reposted with comments and shared," the payment and royalty language is out, "Changing your mind" moves after "Important things to know," and cancellation requests go to Dawn Thompson, CEO, at dthompson@directcarealliance.com, which forwards to her. The signature section starts its own page. Tim: "I think it looks really good." The PDF goes to Tim for review.
- 04 **Leads go to Tim by text.** Gwen texts him a screenshot of the comment or message, or tells him where to find it. Tim reaches out himself and brings Dawn in when someone's interested. Tim's reply to Roger is the standard answer to a "DCA is a DPC" comment.
- 05 **No formal lead tracking for now.** Tim: "We don't need to track them."
- 06 **Invoices go through Tim.** Stripe invoices go to Tim's email. Tim checks with David and pays it. If there's no word in a couple of hours, Gwen texts him.
- 07 **Video is its own proposal.** Tim: "It's not part of this scope." Four videos a month, a mix of talking, animation and humor, with the monthly fee.
- 08 **MLCS and Jeevan go back to Tommy.** Tim takes it to him. MLCS social content is aimed at November 1st, after the beta testers and the salesperson hire. The Jeevan mini campaign likely becomes a first quarter engagement recruiting users.
- 09 **The website redesign gets the platinum version first.** Killer pictures and big banners, so Dawn says "I want that." It goes into a PowerPoint for a meeting when there's bandwidth, along with the lead and heat map build.
- 10 **Tim's COO announcement.** Tim sends Gwen a short bio and a headshot he likes. Blog feedback comes from Tim separately.

ACTIONS

GWEN DIEDE

Send Tim the updated patient story release, as a PDF.

TODAY

Send Dawn the note on X Premium and ask which card to use.

TODAY

Point Stripe invoices to Tim's email.	BEFORE OCTOBER 15TH
Text Tim any lead from comments or messages, with a screenshot.	AS THEY COME IN
Put together the video proposal, four a month.	NO DATE SET
Build the platinum website design into a PowerPoint for a meeting.	NO DATE SET
TIM KAUFELDT	
Send Gwen your COO bio and a headshot.	NO DATE SET
Send your feedback on the three blog drafts.	NO DATE SET
Review the updated release.	WHEN IT ARRIVES
Approve invoices with David.	EACH CYCLE
Take MLCS and Jeevan back to Tommy.	NO DATE SET
DATES SET	
Target start for MLCS social content.	NOVEMBER 1ST
Jeevan user recruiting, likely.	JANUARY TO MARCH