

Weekly Team Training - December 16

Meeting Purpose

[Weekly team training and updates for Capstone Plus program agents.](#)

Key Takeaways

- [New affiliate dashboard portal introduced; agents should verify email to access](#)
- Starting January, agents encouraged to handle presentations for <50 employee companies independently
- [Team considering creation of generic video presentation for smaller prospects](#)
- [Capstone has significant backing and support infrastructure compared to competitors](#)

Topics

New Affiliate Dashboard Portal

- [Shows total businesses and lives referred, including direct and override referrals](#)
- [Displays team hierarchy up to 2 levels deep \(corresponding to override structure\)](#)
- [Technical issues should be reported through support ticket system](#)
- [Most access issues stem from agents not verifying their email](#)

Prospecting and Presentation Strategies

- [Emphasis on warm referrals and leveraging existing networks](#)
- [Suggested approach: offer to save businesses money on payroll taxes](#)
- [Highlight benefits: employee retention, productivity increase, tax savings](#)
- [Use of legal opinion letter to address legitimacy concerns](#)

Program Differentiation and Support

- [~125 dedicated support staff across Capstone, GP Agency, and other partners](#)
- [Financial backing to support scalable growth](#)
- [Importance of proper implementation and servicing emphasized](#)

2025 Meeting Structure Changes

- Agents encouraged to handle presentations for <50 employee companies
- [Leadership \(Andrew/AI\) to focus on 50+ employee prospects](#)

- [Considering creation of generic video presentation for smaller prospects](#)

Supplemental Benefits

- [Plans to offer supplemental benefits for groups under 50 employees](#)
- [GP Agency working on contracting process for appropriate companies](#)
- [Focus on retention-boosting products like critical illness coverage](#)

Next Steps

- Create generic video presentation for smaller prospects (<50 employees)
- [Agents to focus on prospecting through December for a busy January](#)
- [Next team meeting scheduled for January 6th, unless urgent matters arise](#)
- [Agents can email Al to add team members to reminder text platform](#)

Action Items

- **Record clean, generic 14-15 min business owner presentation video. Exclude Capstone name, income details. For use with <50 employee companies.** - [WATCH \(30 secs\)](#)
- **Add provided names/cell numbers to reminder text platform. Email: al@nlstoday.com** - [WATCH \(30 secs\)](#)