Weekly Team Training - November 25

Meeting Purpose

Weekly team training on new system updates and processes for Capstone's agent portal and deal management.

Key Takeaways

- All agents must re-register in the new system using provided links; critical for tracking deals and team production
- New deal creation process requires inputting prospect info through portal before scheduling calls
- Census reports must be fully completed in required template format for processing
- Referral agent compensation not yet integrated in system; temporary workarounds needed

Topics

New Agent Registration Process

- All agents must re-register in new system using provided affiliate links
- 5-minute signup process: enter personal/business info, banking details, verify email
- Crucial for tracking team production and deal pipeline in new dashboard

Deal Creation and Management

- New process: Create deal in portal before scheduling calls
- Input prospect/company details, skip census if not available, book call or skip
- Deal appears in dashboard for tracking; stages updated by market directors/Capstone
- Allows visibility into team's pipeline and deal progress

Census Report Requirements

- Must use provided template with all required fields (in yellow) completed
- Basic employee info needed for any hire (name, SSN, DOB, address, withholdings, etc.)
- Ideally provided as spreadsheet for easy copy/paste into template
- Critical for accurate performer creation; partial info cannot be processed

Referral Agent Handling

- System currently doesn't support referral agent payouts
- Temporary solutions: handle payments manually or reconsider arrangement
- Future update may add referral functionality, but timeline uncertain
- Consider one-time payments or adjusting compensation for minimal referrals

Updated TaxSaver Backend

- Removed "Register Prospect" page; now handled through deal creation
- Updated training resources, documents, and presentation slides
- New secure link instructions for submitting census reports
- Calendar booking links for strategy sessions and prospect calls

Next Steps

- Agents to complete registration in new system by Wednesday

- Team leaders to ensure their downline agents register and understand new processes
- Input existing prospects/deals into new system to familiarize with process
- Review updated TaxSaver backend for latest resources and instructions
- Consider scheduling demo calls with market directors to learn presentation approach

Action Items

- **Sign up for new system using provided link, verify email to activate account** - WATCH (30 secs)
- **Reach out to team leaders to ensure they and their team members sign up for new system by Wednesday** - WATCH (30 secs)
- **Update existing registered prospects from old system into new deal creation system** - WATCH (30 secs)