

## **Capstone Plus Training Module 3 Sales Cycle and Implementation**

### **Overview**

This module will outline the details of the sales process as well as the support involved in these steps. You will learn about your role as the agent, your market director's role, finally, the roles of the remainder of the support staff.

### **Key Points**

- Program has seamless integration within company's current payroll software
- Takes anywhere from 45-60 days for full completion (Can be longer for larger groups)
- Trackable in Capstone Portal
- All enrollments are done as an Opt-Out Enrollment
  - o All eligible employees are enrolled and have 2 weeks from the end of education period to opt-out
- Commissions get paid once a month from the TPA

### **Sales Process Outline**

1. Client Paperwork submitted
2. Implementation kick off Call with Agent, Market Director, Client, TPA, AMAZE
3. Mock, practice and live payroll call
4. Active date

### **Support Team Companies**

- 1. Amaze Health Services**
  - a. Operational for over 8 years
  - b. Provides concierge telehealth to all members
  - c. Acts as the powerhouse of our program
  - d. Responsible for employee education during implementation
- 2. Capitol Group (Third Party Administrator)**
  - a. In business over 35 years
  - b. TPA's for the entire states of Virginia and North Carolina
  - c. Responsible for employee enrollment, payroll implementation, and funding transfers

## **Implementation Kick Off Call**

- Coordinated between, Agent, Market Director, Client, Amaze and Capitol Group
- Purpose is for the support team to familiarize themselves with the client's company and individuals responsible for completing the implementation
  - o Amaze
    - Will speak with the client as to the best way to launch an education campaign for all the employees
      - Email campaign
      - Live Webinars
      - Recorded Webinars
    - Amaze educates the employees on all the benefits we provide, as well as what is going to happen in the employee's pay check's every pay period
  - o Capitol Group
    - Will speak with the client about payroll implementation and the modality in which the program will be analyzed from the TPA perspective
      - Self-Service Portal (Groups < 80)
      - Census to Census (Groups > 80)
      - API, Automatic Payroll Integration (Extremely large groups)
    - Utilizes proforma to game plan for all employees
      - Set up pay codes in the client's payroll system
      - Input all the correct numbers for each employee (deduction and claim payment)
- Education from Amaze is run for 30 days and the employees will have 2 weeks to opt-out after that period is completed.
  - o Our average participation is around 95%

## **Mock, Practice and Live Payroll Call**

- All meetings are scheduled with the TPA on the Kick-off call
  - o Mock
    - Designed to teach the payroll representative of the client what needs to be done for our program
  - o Practice
    - Payroll representative from company and TPA work together to practice implementing all the pay codes and numbers for the employees
  - o Live
    - Happens on the last pay period prior to the effective date
    - All employees participating will have line items added to their paychecks for the next run of payroll
      - As soon as this is completed, our program is considered Active

## Active Case

- This means that the company you brought to the table is actively enrolled in the Capstone program
- All funds for the program are being collected on a per payroll basis and the commissions are developing
- All commissions are paid once a month from the TPA
  - o TPA will pay partial commissions if the group has not been active for a full month but it's time for commissions to go out
  - o All direct deposit

## Full Support Team Breakdown

- Capstone Health and GP Agency
  - o Capstone Health and GP Agency are owned by the same people
    - GP Agency
      - Over 56-year history in financial services
      - About 100 total employees
    - Capstone Health
      - Almost 10-year history in this space
      - Has about 60 employees from GP for support on this program
- Amaze
  - o Telehealth provider and employee education liaisons
    - Around 170 staffed W2'd Medical Professionals
    - Around 30 employees designed for employee education
- Capitol Group
  - o Third Party Administrator
    - Over 35-year history in the business
    - Around 80 employees in total for support in our platform

## Summary

This is the piece of the puzzle that solves all issues in this industry. There are many companies out there who claim to have the best product, and they might. However, they can't process the business. Capstone has all of their ducks in a row when it comes to support in order to facilitate the business from the initial presentation to active.