

Weekly Team Training - February 03

Meeting Purpose

[Weekly team training call to provide updates, review processes, and discuss strategies for the Capstone Health tax efficiency program.](#)

Key Takeaways

- [Capstone is well-positioned with 600,000+ potential lives in pipeline; business closing regularly with 45-60 day sales cycle](#)
- [Program has strong support infrastructure \(125-150 dedicated staff\) and is fully compliant](#)
- [Focus on booking meetings efficiently using simple, interest-piquing approaches rather than over-explaining](#)
- [New training modules being developed for onboarding new team members](#)

Topics

Company Update

- [600,000+ potential lives in pipeline across various companies](#)
- [60+ Capstone employees, 30 Amaze employees, 25-30 TPA employees dedicated to program](#)
- [Fully compliant with proper legal background](#)
- [Chris Gaddis involved in frequent discussions; things going well](#)

Program Benefits and Structure

- [Utilizes ACA section 4303 allowing preventative care billing to insurance companies](#)
- [Indemnity plan enables health screening benefit based on CPT codes](#)
- [Example: 127 qualified employees, \\$78,000/year tax savings](#)
- [Employee sees ~\\$240/month increase in take-home pay](#)

Sales Process Overview

1. Complete presentation
2. Register business in back office
3. Complete quote (if needed)
4. Receive census
5. Connect to support team (Amaze, TPA)

Prospecting Strategies

- [Focus on booking 20-30 minute meetings without over-explaining](#)
- [Target CEOs, CFOs, executive-level decision makers](#)
- [Start with warm market contacts, then expand](#)
- [Use simple script: "If I could save you \\$X in payroll taxes, would you want to know about it?"](#)

Meeting Booking Process

- [Use Calendly link in Capstone portal to schedule](#)
- [Include detailed notes about prospect \(role, company size, etc.\)](#)
- [Add yourself as a guest to receive communications](#)
- [Be mindful that prospects can see notes in calendar invite](#)

Next Steps

- [Implement new training modules in TAFSA for onboarding](#)
- [Encourage team members to attend live calls for better engagement](#)
- [When booking meetings, include all relevant attendees and detailed notes](#)
- [For West Coast agents, text Al/Andrew for late appointments if needed](#)
- [Utilize provided calendar links to book meetings efficiently](#)

Action Items

- **Log into Capstone portal. Navigate to Create Deal > Plus Plan to register prospects.** - [WATCH \(5 secs\)](#)
- **Share Trustpilot.com link for Amaze reviews with prospects requesting testimonials.** - [WATCH \(5 secs\)](#)
- **When booking meetings via Calendly, include positive notes about prospect visible to them in invitation.** - [WATCH \(5 secs\)](#)
- **Encourage team members to attend live Monday training calls at 4pm Eastern.** - [WATCH \(5 secs\)](#)
- **Text Al for approval before booking West Coast meetings after 2pm Pacific.** - [WATCH \(5 secs\)](#)
- **Log into Tax Saver backend to access Al and Andrew's calendar booking links.** - [WATCH \(5 secs\)](#)