

Weekly Team Training - April 28

Weekly team update and agenda @ 0:00

Andrew welcomed the team, noting it's almost May and there is a lot of positive momentum, including with the Capstone program. The focus today will be on process, team building, and an overview of the TUA portal from Tina.

Building and recruiting best practices @ 1:03

Andrew and Al discussed the importance of having a replicable system for building a team, rather than just doing everything yourself. Key points include:

- Consistently following up with new recruits to keep them engaged
- Showing up prepared and on time for meetings/calls
- Partnering with the recruiter to leverage their credibility when presenting to business owners
- Flooding the pipeline with appointments rather than expecting every one to close

Capstone program implementation process @ 5:00

Andrew explained the process they've developed for getting business owners set up with the Capstone program:

- Leverage existing relationships to book initial appointments
- Focus on highlighting the tax savings benefits to pique interest
- Participate in the presentation to learn the process and address common questions
- Maintain close involvement to ensure a smooth implementation

TUA portal overview @ 30:20

Tina provided an overview of the features and resources available through the free and paid TUA memberships, including:

- Weekly training webinars
- Downloadable resources and guides
- Community discussion forums
- Discounted access to the TUA 360 CRM

Recap and next steps @ 47:16

The team wrapped up with a few final comments and reminders, including:

- Encouragement to stay active and engaged in the TUA community
- Clarification on the Wednesday Capstone training calls