

Weekly Team Training - January 06

Facilitating initial meetings @ 0:42

Andrew and Al offer to join calls with agents and business owners to help get initial meetings booked, as agents sometimes struggle to keep the conversation focused on just scheduling the meeting. They encourage agents to reach out when they have a business owner ready to speak, so Andrew and Al can join the call and help guide the conversation.

Choice program setup @ 11:59

Andrew shares that in the next 30 days, he will be fully set up with GP Agency to help facilitate getting everyone set up for the Choice program. This will ensure there are no delays or holdups when agents need to enroll groups in the Choice plan.

Tax Saver website updates @ 13:00

The team is working on updating the Tax Saver website to make it more personalized for each agent, with the goal of having a replicating front-end where the website displays the agent's name. This is expected in the next week or two.

Census report requirements @ 14:02

Andrew reminds everyone that when submitting census reports, they must be in the correct template format, or else they will be sent back. He will reach out to agents if the information provided is good but not in the right format.

Capstone policy on larger groups @ 15:07

Andrew shares that Capstone now requires a market director (Andrew) to be involved in any meetings with companies over 50 employees. This is to ensure the process goes smoothly and that Capstone's compliance requirements are met.

Recap and encouragement @ 36:20

Al provides an encouraging message, reminding the team that while the work is not easy, it is worthwhile and that they just need to convert a few clients to start generating good income. He encourages the team to lean on Andrew and Al for support, especially in the initial client meetings.

Action Items

- **Create employer video w/o mentioning Capstone/Capital Group/Amaze. Add disclaimer re: intentional omission. - [WATCH \(30 secs\)](#)**

- **Create new agent overview video** - [WATCH \(30 secs\)](#)
- **Set up with GP agency for choice program within 30 days** - [WATCH \(30 secs\)](#)
- **Work on replicating front end for TaxSaver247.com - personalized per agent** - [WATCH \(30 secs\)](#)
- **Reach out to Brian Summers for choice plan flyers** - [WATCH \(30 secs\)](#)