

Weekly Team Training - April 20

[Weekly training agenda and executive guest @ 0:00](#)

Andrew opened the meeting noting that today's session would be lighter on content, with the main focus being updates and discussion rather than new material. Next week's training will feature Matthew Butler, an executive from GP Agency, who will provide updates and answer questions about company initiatives. Andrew outlined today's agenda: preferred payroll vendor updates, Wellution app improvements launching May 4, and program updates regarding Kingston Advantage. The team should prioritize attending next week's call to hear from Matthew Butler directly.

[41 preferred payroll vendors now API-enabled @ 2:57](#)

GP has established 41 pre-approved payroll vendors that are now all API-integrated, including PayCorp, Prism, iSolved, Paychex, UKG, Workday, ADP Workforce Now, Gusto, Paylocity, Paycom, QuickBooks Online, and various ADP versions. The two-way sync APIs eliminate the need for custom census data entry—employees simply process payroll normally and data automatically syncs to the TPA. This significantly accelerates implementation for companies under 200 employees using these vendors, as setup now only requires configuring pay codes and training. A new KYC (Know Your Customer) form is required for all business owners signing applications, a post-COVID regulatory requirement that ties the EIN back to an individual. While an additional form, Andrew notes this is SEC regulation and can be leveraged when requesting it from clients. Market directors can now send paperwork directly through their own signing processes (e.g., Adobe Sign) rather than routing through GP's DocuSign, improving workflow management.

[Non-approved vendors require exception requests @ 4:24](#)

Any payroll vendor not on the 41 pre-approved list requires submission of a payroll vendor exception request form to Howard for setup. Andrew acknowledged uncertainty about billing and operational details for these exceptions and committed to clarifying the process on Friday. For example, Sage Business Works (distinct from the approved Sage HR) would require an exception request. The process is expected to take longer than approved vendors but remains available for clients using non-standard payroll software.

[Wellution app May 4 update enhances UX @ 10:15](#)

The Wellution app update launching May 4 focuses on improving user experience and interface design. Key enhancements include: cleaner appearance with easier navigation to services (displayed prominently as "access your benefits" button), device connectivity integration (e.g., syncing with Apple Watch data), and facial scan functionality now working on computers. GP and prescription vendor Best Choice Rx are developing a GLP-1 program to offer more affordable options for this increasingly popular medication. Legal Club and Identity Theft

Protection benefits are now extending to family members, enhancing value for employees. All updates are enhancements to existing benefits rather than entirely new offerings.

Operational improvements: communications and contracting @ 14:16

Jade, GP's new Communications and Compliance Coordinator, will lead all future communications from GP to ensure advance notice of policy changes, new products, or best practices—preventing last-minute announcements. The contracting system has been temporarily paused to implement automatic agent ID generation. Currently, GP must manually generate agent IDs for existing producers, which is inefficient; the new system will automatically assign IDs upon signup, similar to IMO processes. Once the system is live, contracting will resume through the portal. For urgent one-off contracting needs, the team can work with internal contacts to complete setup outside the portal. Andrew recommends holding off on adding new team members until the system is fully operational to avoid complications.

Darius offers iSolved payroll support @ 17:14

Darius, a team member specializing in iSolved payroll software, is available to assist with payroll-related issues and client transitions. He recently helped a colleague by accessing a client's iSolved system, creating a custom census report using the software's report writer, and waiving his fee to expedite a deal closure—the client moved forward within days. Darius prefers phone contact for time-sensitive issues and email for non-urgent matters (with a 24-hour turnaround). For clients using non-standard payroll software or experiencing issues with their current provider, the team can refer them to Darius or leverage GP's relationship with UKG, where GP covers transition fees to move clients to UKG's platform.

Kingston Advantage commission restructuring @ 19:38

GP is streamlining commission structures across programs to create more uniformity. Kingston Advantage commission has been restructured: for DSPs or groups with 100+ employees, commissions remain at the previous reduced level; for groups under 100 employees that are not DSPs, commissions are reduced further. Kingston Advantage can still be offered to all groups, but the lower commission for smaller non-DSP groups reflects GP's minimal revenue collection from this plan. Matthew Butler's recommended strategy is to lead with Capstone Advantage (which includes CPC coverage protecting the company and offering a certificate of insurance) and pivot to Century Premier if clients are in one of the 40 states where it's available. This approach maintains similar commission structures while offering comparable benefits. Capstone Advantage provides the same benefits as Kingston Advantage plus CPC coverage, with only a \$40 admin fee difference—a value proposition that resonates with prospects concerned about company protection.

Capstone Health Management becomes sole distributor @ 24:19

At some point this year, Capstone Health Management will transition from being a product owner to serving as both owner and distributor, replacing GP Agency as the distributor. This is primarily an optical change—presentations will reference "Capstone Health Management" rather

than "GP Agency," simplifying the narrative by removing one company name. The change does not affect dollars, programs, benefits, or commissions; it's housekeeping to streamline branding. GP remains involved as a market director for Capstone, and the same owners oversee both entities.

Century Premier state coverage and availability @ 27:10

Century Premier is available in Rhode Island, Connecticut, Vermont, Maine, and southern states, but not in Massachusetts, New Hampshire, or states like Washington, New York, Oregon, Idaho, and New Mexico. If a company's headquarters is in a state where Century Premier is available, the plan can be used even if the company has employees in other states. Andrew committed to obtaining an updated state availability map for the team. The reasons for unavailability in certain states (particularly California and northeastern states) are unclear but relate to regulatory or market factors.

DSP in a Box marketing package available @ 28:39

A comprehensive marketing package called "DSP in a Box" is available for direct marketing campaigns targeting Delivery Service Providers (DSPs). The package includes information on self-funded medical benefits, MVP value plan, Kingston Advantage, accident and critical illness coverage, optional riders, benefit administration services, COBRA, ACA filing, Forms 5500, and HIPAA protection. Rather than overwhelming prospects with the full document, Andrew recommends leading with a conversation and using the package as a detailed reference when prospects request specifics. The package can be shared with DSP prospects and is available in the portal. DSP owners' income is typically capped based on their routes and state, making Kingston Advantage an attractive entry point, with the broader package offering opportunities to sell additional services.

Matthew Butler executive briefing next Monday @ 33:13

Matthew Butler, an executive from GP Agency, will join next Monday's training call for approximately one hour. He will provide company updates and answer questions, though he may not have a formal presentation prepared. Andrew emphasized that Matthew is a busy executive and recommended the team prepare a focused list of 2-3 pressing questions rather than overwhelming him with 50 questions. This session is positioned as a valuable opportunity to hear directly from leadership and gain perspective on company direction and initiatives. Andrew encouraged all team members to attend and mark their calendars.