

Weekly Team Training - September 15

[Implementation process overview @ 0:00](#)

Andrew provided a detailed overview of the Capstone implementation process, including the welcome call, configuration call, practice payroll, go-live, and employee education campaign. He explained the purpose and key activities of each step.

[Employee education and onboarding @ 6:00](#)

The employee education campaign was highlighted as a critical component, involving 6 emails, 3 text messages, and an employer-to-employee email. Andrew discussed the importance of employees registering for their Wolution accounts within 72 hours, and the benefits of proactively encouraging adoption.

[Addressing legal concerns @ 24:00](#)

There was a discussion around legal concerns some clients may have, particularly around the tax treatment of the claim payments. Andrew acknowledged the ambiguity in the language, but emphasized that the program is fully compliant, and that GP is working to further improve the clarity and reduce any perceived risk.

[Strategies for obtaining census data @ 26:49](#)

The group discussed best practices for obtaining the required employee census data from clients, noting that engagement from decision-makers is key to expediting this process. The option to leverage GP's data extraction service was also mentioned.

[Upcoming training and events @ 39:45](#)

Andrew provided updates on the upcoming training sessions and events, including the Wednesday call with Life Guides, the professional development series, and the October 6th call with Matthew Butler from Capstone.

[Recap and next steps @ 43:33](#)

The meeting was wrapped up, with Andrew encouraging the team to review the recorded interview shared in the chat and to tune in to the upcoming Wednesday and Thursday sessions.