

# Weekly Team Training - September 08

## Upcoming training and updates @ 0:01

Andrew reviewed upcoming training plans, including speakers from Frontline, Identity, Legal Club, and LifeGuides joining the Wednesday calls over the next few weeks. He also mentioned upcoming changes to the Monday call cadence and content as the team shifts focus to closing business in Q4.

## Key Capstone Plus personnel and roles @ 2:26

Andrew provided an overview of the key Capstone Plus personnel and their roles, including Matthew Butler, Howard Setzer, Cintia, Dalton, Josh Childress, and Matthew Koble. He emphasized the importance of understanding these contacts and their responsibilities.

## Prospecting strategies and target segments @ 18:09

Al and Andrew discussed prospecting strategies, highlighting the opportunity to target voluntary benefits brokers who already have small-to-medium sized books of business. They suggested this could be an effective way to quickly onboard new groups.

## Streamlining the implementation process @ 21:52

Andrew mentioned that the Capstone Plus team is working to streamline the implementation process, particularly around data collection and paperwork submission, in order to reduce delays and improve efficiency.

## Recap and next steps @ 31:58

The team wrapped up the meeting by emphasizing the importance of attending the Wednesday training calls to hear directly from vendors, and encouraged the group to continue prospecting and closing business in the final quarter of the year.