

Weekly Team Training - August 25

[Upcoming schedule changes @ 0:00](#)

Andrew announced that the weekly team training will be skipped next Monday due to Labor Day, but will resume the following Monday at the regular time. He also noted that this is the last week for the hospital indemnity plan, which will transition to an accident indemnity plan starting September 2nd.

[Key websites and portals overview @ 2:17](#)

Andrew provided an overview of the key websites and portals used by the team, including the Capstone Producer Portal, the Wellness HQ prospecting website, and the GP Agency producer website. He emphasized the importance of properly registering prospects in the Capstone Producer Portal.

[Open enrollment considerations @ 6:39](#)

Andrew discussed how open enrollment season, typically in October and November, can impact prospecting and installation of new programs. He advised the team to be prepared for companies to be hesitant to add new benefits during this time, but noted that it also presents opportunities to have Capstone Plus installed after open enrollment is complete.

[Legal Club and identity theft benefits @ 9:44](#)

Andrew provided details on the Legal Club and identity theft benefits that have been added to the Capstone Plus program, including the services and coverage provided under each.

[Strategies for prospecting and selling @ 30:21](#)

Al and the team discussed various strategies for prospecting and selling, including focusing on the prospect's pain points, building relationships, and taking a targeted approach rather than trying to sell multiple products at once. They emphasized the importance of persistence and following up.

[Recap and next steps @ 50:37](#)

Andrew and Al wrapped up the meeting, noting that the next training sessions will cover higher-level concepts and the Capstone Plus with Accident plan. They encouraged the team to reach out if they have any questions or need support.