

Weekly Team Training - October 27

[New product launch details @ 0:49](#)

Andrew reviewed the upcoming product launch details that will be covered in the Wednesday training session, including new plan options, enhanced technology, broker tools, client onboarding, updated TPA partnerships, and improved commission processing.

[Census collection automation @ 2:15](#)

Andrew shared an upcoming feature that will allow clients to automatically pull their census data from their payroll system, significantly streamlining the onboarding process which has historically been a pain point.

[Capital Group partnership issues @ 9:31](#)

Chris Gaddis discussed recent challenges with the Capital Group partnership, including communication and implementation problems. In response, Capstone has decided to add another TPA provider as an option for brokers, which Capital Group did not like. Chris reassured the group that commissions will continue to be paid, and encouraged brokers to attend the Wednesday training to learn about Capstone's new products and solutions.

[New Capstone product lineup @ 17:47](#)

Chris provided an overview of Capstone's new product lineup, including the Advantage plan with zero employer fee, the Century Advantage plan for Puerto Rico, and the fully insured Century Premier plan. He highlighted the improved technology, automation, and increased broker compensation that will come with these new offerings.

[Municipal market strategy @ 29:02](#)

Mike Bucci shared his approach to successfully targeting the municipal market, including building relationships with key stakeholders like mayors and finance directors, attending local events to make connections, and persistently following up to keep the process moving forward. He emphasized the importance of understanding the municipal industry and being willing to go in-person to build those relationships.

[Recap and next steps @ 46:21](#)

Al and Andrew recapped the key takeaways from the meeting, including the transparency from Chris on the Capital Group situation, the importance of understanding your target industry, and the recommendation to attend the Wednesday training session. They encouraged everyone to reach out if they have any further questions.