

Weekly Team Training - June 30

[Introduction to Teresa's team and concierge services @ 0:00](#)

Andrew introduced Teresa and her team, who provide concierge services to help agents with individual life, annuity, long-term care, and disability insurance cases. Teresa explained how her team's expertise across different product lines can assist agents who may not be experts in every carrier or product, allowing them to focus on serving clients while her team handles the administrative tasks.

[Legal and identity theft protection benefits @ 25:07](#)

Andrew discussed new benefits that have been added to the Capstone Plus and Choice plans, including Frontline Identity (identity theft protection) and Legal Club (legal services). These benefits are included at the standard level, with options for employees to upgrade their coverage if desired.

[Client Protection Coverage \(CPC\) for Capstone @ 31:10](#)

Andrew explained the new Client Protection Coverage, which replaces the previous indemnification and provides protection for Capstone clients in case Seahawks or Capstone makes any mistakes that negatively impact the business. This coverage is included in the Capstone program at no additional cost to the client.

[Importance of solution-oriented approach @ 38:18](#)

Andrew emphasized the importance of taking a solution-oriented approach when speaking with business owners, focusing on identifying their specific issues and challenges, rather than just presenting products. He encouraged the team to have open-ended conversations to understand the business owner's needs and then offer tailored solutions, rather than just pitching a specific product.

[Recap and next steps @ 48:20](#)

Andrew summarized the key topics covered in the meeting and reminded the team about the upcoming Capstone training call on July 9th, which he said would be an important one. He also encouraged the team to continue having conversations with business owners and leveraging the resources and expertise available through GP to identify and address their needs.