

Weekly Team Training

Meeting Summary | May 11, 2026 UTC

Executive Summary

Andrew led a focused team training covering scheduling adjustments, onboarding and census submission processes, stronger discovery through the client profile form, and the team's shift toward solution-based selling.

The central theme was to move away from product-pushing and instead identify the business owner's problems first, then position GP/Capstone solutions around the client's specific needs.

The team also discussed internal growth, leadership changes, and upcoming technology improvements intended to make implementation faster and more automated.

Agenda and Staff Updates

Andrew opened with a light agenda centered on scheduling process adjustments and business onboarding procedures. He noted that Matthew Butler is no longer with GP as of the prior week and plans to take May off. Key team websites remain partners.gpagency.com for tracking business and commissions, along with the prospecting site.

Scheduling Process Changes

Scheduling has been narrowed to mornings Tuesday through Thursday, and the booking link has been temporarily suspended. Agents should make sure business owners or true decision-makers are present before scheduling calls. Agents are expected to give prospects a basic program explanation before coordinating directly with Andrew for meeting times. Andrew is also working with Chris to secure an additional presenter for the team.

Client Profile Form

Andrew introduced a client profile form used successfully by other market directors who reportedly close three to five deals per month. The form is designed to capture key business information such as employee count, payroll cycle, decision-makers, and current benefits. The form should be used to guide discovery and improve close percentages by uncovering broader needs instead of leading with a single product.

Solution-Based Selling

Andrew emphasized that the team must position itself differently from typical insurance agents. The goal is to uncover pain points first, then recommend tailored solutions. This helps overcome the "just another insurance agent" perception and frames the team as business problem-solvers.

Objections and Implementation

Roy asked about the "Too Good To Be True" objection. Andrew explained that this objection usually comes from prospects not understanding how claim payments can result in net pay increases. He suggested connecting the concept to familiar carriers such as Aflac while explaining that the program has optimized the process so benefits can be handled through payroll rather than manual claim submission.

Client Profile Questions

Darius asked about the workers' compensation and merchant services sections of the profile. Andrew advised not to over-focus on workers' comp because it is mandatory, and instead prioritize areas where the team can

create greater impact. Andrew said he would check on merchant services partnership opportunities as GP continues evolving toward a broader business purchasing organization model.

Contracting and Census Submissions

Kai confirmed his GP contracting appears complete because he can access the partner portal. Andrew explained that when agents create opportunities and upload census information, they should also email him directly because the system does not automatically trigger performance generation. Andrew will submit the request for the home office to generate the performance.

Andrew's Evolving Role

Andrew discussed moving into a more managerial Field Vice President-style role similar to Chris's position. This would allow him to focus more on supporting agents with near-decision clients while a new supplemental presenter handles more day-to-day presentations. Existing business will continue to run through Andrew as before.

Company Growth and Leadership Updates

Andrew shared that Capstone has 44,165 lives enrolled since January, representing approximately three times more activity than Q1 of the prior year. He also discussed leadership changes, including Wes Williams moving into the CEO role while Tom and Chris transition to board-level roles focused on working on the business. CTO Derek Watley is leading technology optimization efforts.

Technology and Process Improvements

GP is implementing technology improvements, including an AI tool designed to join calls, update CRMs, and trigger workflows automatically. The Helix program is expected to give employers an online portal to complete paperwork. These improvements are intended to reduce implementation time from roughly 45–60 days to 30–45 days. Most improvements are targeted for July 1, with the Wellution app update expected sooner.

Licensing and Wrap-Up

David mentioned submitting licensing information without confirmation. Andrew advised that access to the producer portal generally indicates the information is on file. The team also discussed downloading GP-branded Zoom backgrounds for client meetings. Andrew closed by saying he would upload the recording to Wellness HQ and encouraged the team to keep prospect conversations moving.

Key Takeaways for the Team

- Do not schedule calls unless the business owner or real decision-maker will be present.
- Use the client profile form to uncover the full scope of the client's needs before recommending solutions.
- Frame GP/Capstone as a business solution, not just an insurance product.
- After uploading census information, email Andrew directly so performance generation can be requested.
- Expect process and technology improvements to continue rolling out, with a target date of July 1 for most updates.