

Virtual Preened: Directions for Mtg and Follow-up by Kelly Owens

ADVICE:

- Stock up on highlighters, staples, business cards, large envelopes (I used 11x13), GPL's, Family folders, TDG's, copy paper and toner for your printer
- Also, if gathering information via phone rather than Zoom meetings or Microsoft Teams, schedule your phone appointments 2 hours apart in order to allow time for entry into DIGicon after your initial informational conversation has taken place.

STEP 1a – Contact family via phone – get the appointment! Be Assumptive!!

STEP 1b – Conduct information gathering phone call (generally 30-40 min in length, ALWAYS assume the next appt as well – get it set up BEFORE ending call)

STEP 2 – Provide applicable documents: Outlined below

Contents of Kelly's Mailings

- Family folder with business card attached

FRONT: Front of folder is an "Explanation of Enclosures" (sample provided). The verbiage differs slightly with each family based on their G&S needs.

Right side:

- G&S statement from DIGicon, (with print outs of pictures of all merchandise attached)
- GPL with highlighted applicable section
- Arrangement folder (my equivalent of the TDG) – highlighted again for the information I need them to complete
- *Cash Advance Items #55*

Left side

- Notes Page (self-made; included)
- *About Us For Policyholder #68*
- *Funeral Planning and Medicaid Spend Down Rules #780*
- *Medicaid Brochure – Burial Space Items #85*
- *Cremation FAQ #62* (if cremation is chosen)
- *Ask Me About* flyer (self-made; included)
- *Household Firebox* list (self-made; included)

STEP 3: *From Kelly:* As I see it, the next step is to review the packet documents with them and finalize the contract through their preferred method of communication. **REMINDER:** Be sure to set the follow-up conversation EVERYTIME during your initial information gathering phone call. I use 1 week out or the longest is 2 weeks.