

## Virtual Preneed: Appointment Setting – key phrases highlighted

“Hi Mrs. Smith, this is (your name) from (your funeral home) calling. Are you and you’re family doing okay with sheltering in place? *[Allow them time to share.]* Good! I received your request to attend our seminar which, of course, had to be cancelled.

However, we’re doing some pretty exciting things with the new ways we have to virtually meet with our families. We have virtual meetings using Zoom, Facebook Live, and others. We’ve also been very productive with meeting over the phone. All of these options are working nicely because it’s so important to keep this conversation going and it’s important to get the information that’s specific to your family into your hands.

I’m setting appointments today for next week; my schedule for this week is very, very busy. I have next Wednesday open at either 10:00 AM or 2:00 PM. Which works best for you. 10:00 AM? Great! I see here that you provided your email address. Would you be comfortable having a virtual meeting online? That sounds good.

What happens next is that I will send you an email with a link attached. You’ll just click on that link when it’s time for us to meet and we’ll connect over the internet. I’ll give you a call five (5) minutes before to make sure we’re connected on the internet; we’ll then hang up our phones and talk over the computer. Thank you so much and stay in and stay safe.”



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