

## Virtual Preneed: Best Practices

1. Organize your workspace and materials (packets) – stock up on highlighters, staples, business cards, brochures, large envelopes for mailing, GPL's, TDG, copy paper and toner.
2. Be sure to manage your time; do not overbook your schedule!! I panicked at first and stacked appt after appt and it ended up being detrimental to my physical and mental health and overall attitude of acceptance.
3. Adjust your expectations on the timeframe it will take to close a deal. Remember the virtual way (especially phone and US Mail etc. takes more of your time and more time in general between steps). Allow yourself some down time to simply step outside and relax.
4. Provide value!!! Through the topics of your conversations, through the content of your “packets”. Review the brochures on Online Access and determine what best works for you. I use Medicaid, BSI, Cash advances, FDLIC (About Us) and the cremation FAQ when applicable.
5. BE ASSUMPTIVE!!!!
6. Take GREAT and thorough notes.
7. Use multiple ways to collect paperwork and contracts. BUT... if you use door to door, use hand sanitizer, gloves, Lysol, etc. whatever it takes to keep them and you safe and in accordance with social distancing guidelines.
8. Identify THEIR preferred method(s) of communication and use it.
9. Stress that each packet is PERSONALIZED for each family.
10. Use intonation, the rise and fall in your tone of voice, to stress important points.
11. Be EXCITED – assure and reassure the family about this process because this method works!
12. Overcome your fear of mailing/emailing a Thoughtful Decisions Guide (TDG)! I had NEVER mailed or distributed the TDG in the past; in fact, the concept mortified me. I was afraid that I'd be replaced by a booklet. Remember if your packet has great value, it will spark questions that ONLY YOU can answer.



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