



M O M E N T U M



FUNERAL DIRECTORS LIFE

Presented by
Myra Dykes
And
Tracy Bell

Getting the Numbers in November and December



What can you
expect from
this session?

- When to start planning
- Having a positive mindset
- Setting goals
- How to ramp up your prospecting before the holidays are here
- How to get more sales in November and December
- Overcoming holiday objections





Poll



When should
you begin
your holiday
sales
planning?



Run strong
from
September 1st
to December
31st



Develop a
positive
mindset

**NO MATTER WHAT COMES YOUR WAY,
SHAKE IT OFF AND MOVE FORWARD.
WHEN YOU HAVE A POSITIVE MINDSET,
YOU CAN'T BE DEFEATED.**

InspirationBoost.com



7 ways to develop a positive mindset

Believe in yourself

Positive affirmations

Fill your head with positive thoughts

Focus on your strengths

Be grateful

Replace “I have to go to work” with “I get to go to work – today is going to be great!”





Celebrate
every win
with your
team!



Are you competitive?

- Set some goals: volume, activity, number of calls, number of appointments
- Compete against your numbers from last year
- Compete against your average age from last year to lower by a certain %
- Compete against your average contract size from last year to lower by a certain %
- Compete against teammates



Increase Holiday Sales

- Do the unexpected!
- Offer OTG Protection
- Plan Events that capitalize on the season
- Send out Price Increase letters
- ***Keep doing what you already doing ...
just amp it up!***



Let's start
with amping
up your
efforts during
the holidays

- Aftercare
- Medicaid Spend-Down
- BSI
- Follow up on old deals
- Work the files



Aftercare

- Remember that Aftercare is important
- Funeralbasics.org
- Order grief brochures via Online Access
 - #107 Journey through Grief
 - #108 6 Needs of Mourning



Medicaid and BSI

- Contact the Business Office Administrator at local nursing homes
- Be the trusted advisor
- Talk to your sales manager about being trained on Burial Space Items (BSI)



Work the Files

- Unfunded and partially funded files
- Talk to your Sales Manager for help with creating a list of your old deals
- Offer everyone the chance to finish their plan before the holidays. What a gift to give to their family!





The Gift of Preplanning



Price Increase letters

- With your Funeral Homes approval
- Create a list
- Email and Snail Mail
- Video/Audio Text
- Video Email



Mike Nielsen's Video on Price Increases



Do the Unexpected

- Go-By's can be good
 - *If your state allows*
 - *Weather permitting*
 - *Bring cookies or another small gift*
- Mail Christmas cards
- Send a Christmas email
- Send a video Christmas wish via text or email



These are GREAT ways to prompt people to meet with you.



On the Go Protection

- Offer to every family you speak with
- Offer to past protected families
- Make extra Christmas spending money



Plan Events

- Lunch and Learns
 - Change up the Content
 - Policeman to speak on Senior Safety during the holidays
 - Fireman to speak on home safety
 - An expert to talk about cybersecurity
- Brunch Meetings
 - Day before Thanksgiving Brunch
- Christmas Cookie Decorating Party
- Dinners and Discussions
- Open House – Come and Go



Plan Events

- Trunk or Treats
- Shred Days
- Remembrance Services
- Ornament Decorating
- Nursing Home Christmas Caroling





Gather up new contacts!

Lots of
Seasonal
Gatherings

Local Associations

Chambers

Senior centers

Group and other organizations



Special Appointment Days

- Have a Halloween Appointment Day and give out candy to everyone who meets for an appointment. Maybe the funeral home will let you dress up.
- Have Black Friday Appointment Day – many family members are in town for Thanksgiving, so try to meet the day after the holiday
- Use the week between Christmas and New Years to meet with those who wanted to talk to their families over the holidays
- The week before Christmas is great!



Objections during the holidays

Objection: I want to wait until after the holiday to start my preneed

Response: Instead of waiting, consider doing this now as your Christmas gift to your family. This is much more valuable to them, than getting a tie!



Objections during the holidays

Objection: I need to talk to my family

Response: Perfect! I know you'll be spending time with them over Thanksgiving and Christmas. Let's get back together the week after that to get this done for you. Since I've already gotten your wishes down, finalizing this will be super easy



Success Story

Tracy Bell Holiday Sales- 2020

- September \$90,263
- October \$108,601
- November \$95,057
- December \$150,440



Final Thoughts/Best Practices

- Start in September
- Set goals
- Amp up what you are currently doing
- Be creative with events to host or attend
- Do the unexpected
- Don't assume the holidays will be bad for sales-
expect great results



Key Takeaway

- Start early, have a plan, believe you can do it, and don't give up!





You can uncover more sales in November/December and get January off to a fast start while other sales professionals are sitting back waiting for the holidays to be over.



Q&A

