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
<table>
<thead>
<tr>
<th>7 ways to develop a positive mindset</th>
</tr>
</thead>
<tbody>
<tr>
<td>Believe in yourself</td>
</tr>
<tr>
<td>Positive affirmations</td>
</tr>
<tr>
<td>Fill your head with positive thoughts</td>
</tr>
<tr>
<td>Focus on your strengths</td>
</tr>
<tr>
<td>Be grateful</td>
</tr>
<tr>
<td>Replace “I have to go to work” with “I get to go to work – today is going to be great!”</td>
</tr>
</tbody>
</table>
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