BEFORE EACH APPOINTMENT

BE SURE TO PREPARE:

1

LEARNING AS MUCH ABOUT THE PERSON/PEOPLE YOU WILL BE MEETING WITH.

- Medicaid spend down?
- Do they own Cemetery property/where?
- Will they be planning for themselves or someone else?
- If someone else, what is the relationship and circumstances?
- Are they or are they planning for a Veteran?
- Do they want to meet in person or remotely?

2

IF APPLICABLE, ASK THE CLIENT TO BRING IMPORTANT DOCUMENTS LIKE:

- Cemetery paperwork
- POA
- DD214 or Discharge Papers
- Photo

3

VENDORS, TAKE A LOOK AT FUNERAL HOME OR CEMETERY WEBPAGES AND KNOW WHO YOU WILL BE CALLING ON.

4

THINK ABOUT WHY/HOW YOUR SERVICE/PRODUCT WILL BENEFIT YOUR FAMILY/CLIENT.

5

IF YOU KNOW THE CIRCUMSTANCES AROUND THE PERSON PLANNING, TRY TO THINK WHAT THEY MAY BE GOING THROUGH.

6

REMEMBER TO SLOW DOWN IF YOUR SPEECH IS TYPICALLY FAST, AND EXPLAIN THE BASICS.

Sometimes we forget how much we know and that the average family or client we see may need the very basics.

7

KEEP EVERYTHING ORGANIZED AND SIMPLE. ORGANIZE YOURSELF PRIOR TO MEETINGS.

JILL LAZAR
Homesteaders Account Executive
Licensed Funeral Director
Certified Preplanning Consultant
jlazar@homesteaderslife.com
717-805-1552

A 1989 graduate of the Pennsylvania State University and a licensed funeral director with over 25 years of experience. Jill's primary focus for the majority of her career has been on helping families through the pre-planning process. She is a licensed funeral director, PA certified preplanning consultant, and president at the Carlisle Community Toastmasters.

Homesteaders Life Company

AFTER EACH APPOINTMENT

REFLECTION AND SELF CHECK:

1

ASK YOURSELF, "HAVE I ASKED FOR THE SALE?"

2

WRITE A LITTLE THANK YOU AND DROP IT IN THE MAIL.

3

ENTER ALL NOTES IN CRM, REMEMBER TO NOTE ALL WHO HAVE ATTENDED.

4

FOLLOW UP WITH ANY RESOURCES YOU THINK WOULD HELP YOUR FAMILY/CLIENT.

5

IF YOU DO NOT HAVE TIME TO ENTER INFORMATION IN CRM KEEP GOOD WRITTEN NOTES.
See daily flow chart provided.

Notes: ______________________

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APPOINTMENT AND LEAD TRACKER

Date:____________________

Agent Name:____________________

NAME	PHONE #	FOR	TYPE OF LEAD	NOTES

✓ – Appointment Set
$ – Funded
O – Call Back
X – Not Interested

Note your lead source and indicate whether you have set an appointment, need to call back or the lead is no longer interested.

Each day, indicate your total sales. At the end of the week, tally your weekly total by types of lead sources.

Lead Source Legend

TYPE	CODE	WEEKLY TOTAL
Walk-in/Call-in	WI	____
Direct Mail	DM	____
Aftercare	AC	____
Seminar	SEM	____
Lunch & Learn	LNL	____
Referral	REF	____
Online Form	OF	____
Social Media	SM	____
Community Event	CE	____
____________	__	____
____________	__	____

ICCFA's **2021 DEAD Talks** Sales Conference
*Back to **BETTER***

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