

Dead or Alive?

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DEADTalks
The **Pre-need** Conversation

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Are you dead or alive?

Uncomfortable → Change → Stimulation → Growth
SUCCESS!!

How we have always done it, no longer applies!!

“Death care as a whole is confused over what to let go and what to cling to...the best way to get out of a slump is to acknowledge it and get back to basics”.

The Right Way of Death

Great customer service leads to brand loyalty, brand loyalty comes from value, VALUE leads to SALES!!!

Covid squashed customer service

Make it about them...not about you!

Listen to understand, not listen to reply!

TRL

Trust: prepared, educated, process, value statements,
honest and transparent

Respect: kind, considerate, respectful and ethical

Like: automatic when you earn their trust and respect

Top 8-10 closing techniques for pre-need sales....

- *“Remember” what they are going through, treat every appt as if*
- *Start your conversation with a “you” statement*
- *Get the appt, before you leave the appt*
- *Be specific on your next visit, don’t be random*
- *Ask “WHY”*
- *Walk out*
- *Never say...”Do you want”...or ...”Would you like”*
- *Appt Summary sheet*
- *24-hour rule*
- *Referrals*

Name: _____

Date: _____



APPOINTMENT SUMMARY

- ☐ **My most important reason for planning ahead is:** _____
- ☐ **Guaranteed / Non-Guaranteed Goods & Services** – explained guaranteed funeral costs as well as the non-Guaranteed items of 3rd party charges (i.e. obituary, flowers, permits, taxes, etc.)
- ☐ **Modal Pay Disclosure Form** – (if applicable) explains the monthly payment selected, includes early pay off options and limited death benefits
- ☐ **(Ins Company Nema)** – is the insurance carrier holding your monies and to whom you make payments. You will receive a large white envelope with (ins company) written on it in 2-3 weeks. This is your insurance policy. Please place in your folder with the remaining paperwork. Your Financial institution will not show charges from (funeral home), it will state (insurance company or trust name). Processing of payments typically take place in less than 72 hours.
- ☐ **Email from (Insurance company)** – (if applicable) you will receive an email with your policy enrollment after it is submitted. It requires the insured's last 4 of their social security number to open. You may also receive this paperwork by request at our location or in the mail.
- ☐ **Out of Area Protection** – (if applicable) to protect you away from home; you will receive a membership card in 2-3 weeks from (company) - make a copy of the card front and back and give to family.
- ☐
- ☐
- ☐
- ☐ **DD214** (if applicable) – Thank you for your service! The Veteran's Honorable Discharge Form must be in your Pre-Need file to receive any benefits you have earned.
- ☐ **Self-Authorization for Cremation Form** (if applicable) This must be in your Pre Need File.
- ☐ **Survey** – You will receive a survey in 2-3 weeks from a company called (?). Our goal is to provide Excellent Customer Service. Thank you in advance for providing your feedback.
- ☐ **Obituary** - Please create a rough draft for your family.
- ☐ **Our next meeting will be:** _____ @ _____
- ☐ **I strictly work on referrals so if there is someone you care about that would benefit from this same information, who can you introduce me to?**

Please contact

(consultant name) with any questions @

Thank you for allowing (Funeral Home) to serve you and your family!

Today's Takeaway's

Get uncomfortable, so you can continue to grow

Continue to educate yourself

TRL

Listen to understand, not listen to reply

Make it about them, not about you

Ask WHY?

Never say “would you like” or “do you want”

...leaders are those who do, or who arrange to get done, whatever is critical for the team to accomplish its purpose, be willing to “carry” the water 😊