

AGENT RAMP UP (BASICS)

Agents Guide to Daily Success

Learn how to enhance goal setting and improve planning and time management of your activities.

Appointment Setting

Change your expectation of appointment setting by learning how to schedule a visit with a potential customer. We will provide you with the essential tools and also provide step by step instructions to help you master the techniques necessary to navigate these steps.

Asking Questions

Asking the right questions is key to closing the sale. This course will guide you in techniques to use to help effectively connect with your families and make more sales.

Becoming a Great Communicator

Do you listen with the intent to understand or listen simply to reply? This course will help you understand the importance of engaging vs. communicating in order to make your time with families more effective.

Beginning Selling Skills

This course is designed specifically to help agents increase sales revenue, confidence, and their income by teaching the five step sales process and the consumer presentation. After completing this course, participants will walk away with the tools necessary to be a successful preneed counselor.

Closing Best Practices

The close doesn't happen only at the end of the sale. Learn a variety of ways to set up a successful close during this course. Also, discuss proven closing techniques and buying signals that will help you increase your closing ratios.

Complying with the Funeral Rule

The Funeral Rule was created by the Federal Trade Commission (FTC) to protect consumers and this module will walk you through how to comply with this regulation.

Consumer Presentation

Sharpen your presentation skills to successfully deliver a consistent presentation to your families every time to increase your sales. Let our training professionals take you through the process step by step so you can master the techniques.

Expanding Your Book of Business

Dealing with lapses and cancellations? Become familiar with a number of ways to increase the persistency rate and reduce the number of customers with buyer's remorse

Handling Consumer Objections at Home

Learn effective responses to objections and turn a presentation into a sale while meeting with your families in their home.

Handling Phone Objections

This course offers training to assist participants in responding to any objection received while phoning families.

Participants also receive the benefit of practicing the newly learned skill on common objections from the industry in order to be fully prepared to make appointments.

How to Handle Shoppers

With the number of shoppers on the rise, the need to train the entire funeral home staff on handling them is critical. Learn various tips and techniques to move shoppers along the buying cycle and increase your close ratio.

Improving Your Mix

We all know that writing younger people is good for you, good for the insurance company and good for the consumer as well! But that ever-elusive question is "how do I do it?" This course will explore different ways to lower your average age and present payment plans as an attractive option to the consumer.

Managing to Activity

Learn new methods in planning, measuring and evaluating the selling process through this course demonstration. This session can be conducted as a brief introduction or a full discussion of the benefits and usage of the selling methodology.

Motivation

Find it and keep it! Exercises within this course will help you determine your own motivation level to understand where you are at today and help you achieve where you want to be in the future.

Plant the Seed, Capture the Lead

Learn how to glean leads from every person that touches your funeral home, leverage funeral home personnel to find people who express interest in making their prearrangements, take advantage of a free lead source by employing a team approach to gathering prospects.

Selling Cremation

Learn consumer presentation techniques, present common cremation options that are easily overlooked and explore personalized packages all while positioning you and your firm as the cremation specialist in your community.

The Sales Process - Phase I and II

Master the sales process as it breaks down into simple, measurable steps. Learn how to measure and evaluate the process so that you can overcome the barriers keeping you from achieving sales goals.

Using the Planning Guide

Effectively guiding a family through a planning guide is an art form and this course will teach you how so that you can move families forward in protecting their loved ones.

ADVANCED SELLING SKILLS

Assessing and Selling to Your Market

Each market has different factors to consider which impacts consumers. Learn how to assess the demographics of the families in the communities you serve so that you can sell successfully to your unique market.

Buying Motives

Understand why people buy and how your presentation fits into the process of them making a buying decision.

Cemetery & Funeral Home Synergy

We are all in this business to help families so this course will help us understand how we can better work together to help families be fully protected.

Circle of Protection

Completing the circle means a family is fully protected from the mortuary and cemetery perspective. This course offers a presentation to review with families that ensures all aspects are covered. Prior to training, some firm involvement will be required in order to complete the presentation.

Consultative Selling

When you really listen to your customers, you will provide better services, grow your sales, and strengthen your reputation and the image of your firm. Learn the elements of consultative selling to help reduce objections, increase persistency and eliminate buyer's remorse.

Cremation Aftercare

Follow up with families regardless of their choice of disposition is an important step. We will provide a step by step approach to meeting with cremation families in order to continue or begin the preneed discussion.

Creative Lead Generation

How does this differ from the Lead Generation courses?

Successful lead generation requires planning, creativity and persistence. Participants in this session will learn how to improve current lead generation methods and find new ways to bring families to the table.

Direct Mail Appointment Setting

Make sure that you maximize your investment in direct mail marketing. This training session will explain the importance of setting goals, giving you the necessary steps to enhance the effectiveness of appointment setting activity including tips to handle the most common stalls and objections. All of this coupled with scripts, skill practice and tools for tracking will set you up for success.

Goal Setting - Striving for the Top

Sales professionals must learn to set effective goals that are measurable and attainable, but that keep them challenged and striving for continual improvement. This course will teach agents strategies to set goals that help them excel.

Group Presentation Best Practices

Group presentations and seminars are quickly becoming a leading source for generating qualified leads. In this

interactive course, learn about the best groups to approach and how to present to them.

Guide to Online Inquiries

How do we help families who only wish to engage with us via the internet? This course will offer suggestions on how to connect with these families in a personal way with a visit being the end result.

Lead Generation - Family Follow Up

Attend this course to polish your lead generation skills with special emphasis on family follow up. This course reviews why Family Follow Up is crucial to your preneed program. You will also receive step by step instructions regarding how to deploy the program.

Lead Generation - Lead Tracking & Management

Lead generation is extremely important to your business and this course will help you track and manage your leads successfully. Learn methods in planning, measuring, and evaluating the selling process through this course demonstration.

Lead Generation - Referrals

Most agents find it difficult to ask for a referral, even from customers who are happy with their services. But learning to generate referrals gives the agent an endless supply of leads and allows them to control their own destiny. Learn techniques to start using today to obtain referrals through this interactive course.

Lead Generation - Price Increase Work Your Files

All firms raise prices from time to time so follow this step by step process in order to communicate with those families who have prearranged but not funded.

Loading Your January Appointment Book

Start the new year off right by planning ahead. Learn how to overcome holiday appointment objections and convert to January appointments, fine tune your appointment setting script and learn how to handle appointment setting objections.

Make Connections Through Community Events

Getting involved in your community is a very powerful tool to complement your marketing and business development efforts. Community relations can help you not only build good will but can also help establish deep, long-term relationships. Find out how getting involved can benefit your firm, learn how to get started and what other firms are doing in their communities, plus how to use community involvement as a relationship-building tool with families you've already served.

Marketing and Selling to Boomers

Become familiar with the characteristics of the Baby Boomer generation and gain ideas on how to attract them to your funeral home. Learn about the techniques for keeping the Boomers interested and engaged in your products and services.

ADVANCED SELLING SKILLS Continued

Marketing to Veterans

This course is designed to help you better understand the Veteran demographic and how you can connect with them in order to honor their service.

Maximizing Your Appointment Setting Skills

Are you ready to take your appointment setting skills to the next level? We will work with you based on your experience with setting appointments to hone your skills and increase your level of success.

Preneed Cremation

Cremation is a means of disposition but it is up to us to sell the value in the services. We will share ways to approach families who select cremation in order to ensure they understand the full value of your offering.

Preneed Insurance vs. Traditional Life Insurance

This course provides an in-depth explanation of the differences between preneed and traditional life insurance. A side-by-side comparison tool is also available so that you can clearly educate your families on these variances.

Prospecting

ABP – Always be Prospecting! A variety of ways to prospect are shared within this course. We will also share what practices top agents use to maximize their time in front of families.

Seasons of Selling

Do you experience peaks and valleys in your sales productivity? Do your sales decline at certain times of the year? This course discusses the natural ups and downs of selling and provides tips on how to turn sales around during tough periods in the sales cycle.

Selling Value

This course teaches the concept of creating value in products and services to customers. The concepts revolve around assisting the consumer in making better value decisions.

Spreading the Preneed Message

Are you utilizing your connections to help spread the important message about preneed? In this course, you will learn to identify those people who are your cheerleaders or influencers in the community. Then learn how to leverage traditional media and social networking to spread your message and build a pipeline of leads.

Strengthen your Fourth Quarter Sales

Learn proven techniques to build a pipeline of viable leads at the end of the year which will lead to sales for your first quarter.

Time Management

Establish a process for determining priorities and planning your day by attending this course. Good time management results in the achievement of goals and relieves unnecessary stress.

Whose Family is It?

At some locations there is tension between at-need staff and preneed advisors. This course will discuss some of the common misconceptions of each role and offer suggestions on how to remove barriers between them.

OWNER & MANAGER FOCUSED

At-need and Preneed Manager Relationships

This course is designed to assist you in building the bridge between the at-need and preneed departments by identifying barriers and brainstorming solutions in order to better serve all families.

Coaching (Managers Institute)

Learn the difference between a manager and a leader, and learn how to lead your team to success and develop a coaching style that creates an environment ripe for continual improvement.

Culture of Accountability (Managers Institute)

This course offers guidelines to help you hold staff accountable for performance. Step by step guidelines are reviewed to ensure your staff understands their job, knows how to do that job & receives ongoing coaching so they stay on the track to success.

Making the Tough Decisions (Managers Institute)

This module is designed to convey critical decision points and problem solving techniques to determine whether or not the agent can make a viable living in your organization...or pursue other employment opportunities.

Recruiting the Right People (Managers Institute)

Finding smart and dedicated agents is one of a manager's most difficult tasks. This course shows you proven ways to attract quality talent and keep high-producing agents. Uncover the secrets to an effective interview and an unbiased decision-making process.

Role of the Sales Manager (Managers Institute)

Every sales manager must fill multiple roles. In this course, you'll discuss the various roles of the sales manager and learn strategies for successfully managing competing priorities.

OWNER & MANAGER FOCUSED Continued

Sales Meetings (Managers Institute)

Deliver a more engaging and effective sales pitch and use every meeting as an opportunity to advance your sales staff and your preneed sales. Discuss the must-have topics for each meeting and ideas on increasing your team's motivation.

Training and Development (Managers institute)

Ongoing training is crucial to the success of your staff and your business. Maintaining a training and development program requires significant planning and commitment. This course teaches you techniques to keep training and development in the forefront of your preneed program, and provides you with the tools you need to establish a program and keep your staff accountable for their own development.

Sales Strategy Events

Our Sales Strategy Sessions provide a safe forum for initiating change, removing barriers that hinder your business results and providing you a strong business support network. As you know, the death care industry is rapidly changing. The market is becoming more and more competitive and taking action is a necessary step. Our strategy events offer an effective way to implement business plans and strategies for success.

After each event, customers are prepared for the future with the following items:

- Strategic objectives, goals and missions
- Complete preneed business plans which include both funeral service and cemetery sale
- Counselor hiring plans
- A customized realistic action plan and ongoing follow-up on executing your goals

Training Agents to Hit the Road Running

Decrease the gap between hire date and first sale. Learn how to quickly get up and running so sales are realized sooner in the sales process.