

Funeral Gurus Worksheets

Robin Heppell, CFSP presents ...

“How to Be An All Star Funeral Director”

“How to Promote Yourself and Your Funeral Home”

“How to Create a Profitable Google AdWords Campaign”

Worksheet Table of Contents

Funeral Director's Post Funeral Report.....	2
2016 Virtual Marketing Calendar	3
Content Brainstorming Sheet	4
Social Network Personal Profile Requested Information	5
Social Media Profile Information Worksheet	6
Social Media Strategy — Quick Start	7
Online Review System.....	8
Online Video Marketing Fast Start Checklist	9
Online Video Marketing Strategy for Funeral Homes — Sample	10
Online Video Marketing Strategy for Funeral Homes — Blank	11
YouTube Funeral Video Tribute Strategy — Sample	12
YouTube Funeral Video Tribute Strategy — Blank	13
10 X 10 Q & A Formula — Sample	14
10 X 10 Q & A Formula — Blank	15
Staff Bio Worksheet	16
Google AdWords for Price Shoppers	17
About Funeral Gurus	18

Funeral Gurus Worksheets

Funeral Director's Post Funeral Report

Surname:		Legal given names:	
Service date:		Time:	Location:
Arranger:	Lead director:	Other funeral staff:	
Casket: present / not present	Urn: present / not present	Type:	
Family: on time / late	Clergy: on time / late	Funeral staff: on time / late	
Reason for being late:			
Approx attendance:	Standing room only: no / yes	Inside temp: hot / cold / just right	
Comments about attendees (any issues, people of prominence):			
# of floral arrangements:		Late floral arrivals:	
Comments about flowers:			
Names & duties of participants:			
Service highlights:			
Service lowlights:			
Positive comments:			
Negative comments:			
Final communication with family (questions / comments):			
Who received guestbook:	Survey given: yes / no	with Post It Note: yes / no	
Task arising # 1: All items returned to family	Who:	Due:	Done: ____
Task arising # 2:	Who:	Due:	Done: ____
Task arising # 3:	Who:	Due:	Done: ____
Other notes / incidents / comments:			
1 (or more) thing(s) above & beyond expectation:			
Ideas to make future services better:			

The purpose of this checklist is to help you improve as a funeral director and provide more meaningful services in the future.
 I wish that I had a tool like this when I was directing services. Now I do use this for all Celebrant services that I conduct.
 Good luck & thank you for making a family's hardest day a little bit easier and a positive memory in the future.

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2016 Virtual Marketing Calendar

Dec 28: New Years Day	Jul 4: Independence Day
Jan 4:	Jul 11:
Jan 11:	Jul 18: Parents Day
Jan 18: Martin Luther King Day	Jul 25: Int. Friendship Day
Jan 25:	Aug 1: Sisters Day
Feb 1:	Aug 8:
Feb 8: Chinese New Year / Valentine's Day	Aug 15:
Feb 15: President's Day	Aug 22: Aug 26-National Dog Day
Feb 22:	Aug 29:
Feb 29:	Sep 5: Labor/Grandparents/Suicide Prevn/ K9/Guide Dog
Mar 7:	Sep 12:
Mar 14: St. Patrick's Day	Sep 19: International Day of Peace
Mar 21: Good Friday / Easter	Sep 26: Rosh Hashanah/World Vegetarian/Islamic New Year
Mar 28: National Doctors Day	Oct 3: Child Health Day
Apr 4:	Oct 10: Thanksgiving (CDN) / Columbus Day
Apr 11:	Oct 17:
Apr 18: Passover / Earth Day	Oct 24: United Nations Day / National Nut Day
Apr 25: Arbor Day/Day of Mourning/Nat. Therapy Dog Day	Oct 31: Halloween / All Saints Day
May 2: May/Holocaust Rem./Nurses/Prayer/Mothers/Teachers	Nov 7: Remembrance Day (Canada) / Veterans Day
May 9: Armed Forces / Peace Officers Mem. Day	Nov 14:
May 16: Mental Health Awareness Month	Nov 21: Thanksgiving (US)
May 23: Victoria Day / Nat. Senior Health & Fitness Day	Nov 28: World AIDS Day
May 30: Memorial Day	Dec 5: Human Rights Day
Jun 6: Ramadan	Dec 12:
Jun 13: Father's Day / Flag Day (US)	Dec 19: Hanukkah / Christmas
Jun 20: Hospice Founder Saunders B-Day	Dec 26: Boxing Day / New Year's Day
Jun 27: Canada Day	Jan 2:
FAQ / QSA Video	
How To / Checklist / Guide Article	
Funeral Home Radio Show	
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

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Content Brainstorming Sheet

Funeral Related Topics:

- Cremation
- Burial
- Natural Burial
- Funeral Trends:
 - Green
 - Celebrations
- Client Family Benefits for
 - Embalming
 - Viewing
 - Funerals
 - gatherings
- Celebrity funerals
- Local spin on national topic

Article Formats:

- 4-Mat: Why, What, How, & What If
- P-A-R: Problem, Action, Result (Case Study)
- FAQs: Frequently Asked Questions
- Ask the Director
- The List
- Press Release
- How To's
- Checklists
- Guidelines / Templates
- Interview Format

Seniors' Related Topics:

- Seniors Guide
- Estate Planning
- Nursing Homes
- End-of-Life
- 55+
- Elder Care
- Hospice

Seniors' Interests:

- Comfort Food Recipes
- Digital Photography Tips
- Food Gift Baskets
- Gardening Tips
- Genealogy
- Motorized Scooters
- Scrapbooking / Crafts

Action Plan:

- Upload to Blog / Website
- Submit link on Facebook
- Engage Readers to Comment
- Respond to Comments
- Bookmark with Social Bookmarks

Tips:

- Write as if you were having a one on one conversation
- Use their words, not 'funeral lingo'
- 400 - 700 words is a good rule of thumb
- Close with invitation to see more articles at:
 - www.YourFuneralChapel.com/articles

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Social Network Personal Profile Requested Information

	Gmail/Google +	Facebook	YouTube	Twitter	LinkedIn
Username	X	Email Address	X	15 Character Max	Email Address
Password	At least 8 Characters	At least 6 characters	login w/ Google info	At least 6	At least 6
First Name	X	X		X	X
Last Name	X	X		X	X
Address		P			
Current Town/City		X			
Postal Code		P	X		
Phone Number		P			X
Mobile Number	X (For Verification)	P		P	
Country	X	P	X	P	X
Email Address	X	X		X	X
Website URL		P		P	
Security Question	X				
Time Zone				P	
Birth Date	X	X	X		
Gender	X	X	X		
Relationship Status		P			
Hometown		P			
Political Views		P			
Religious Views		P			
About Me		P		P	
Favorites		P			
Interests		P			P
College Name & Year		P			P
High School & Year		P			P
Degrees Earned					P
Job Title		P			X
Company		P			X
Current Position		P			P
Past Positions					P
Groups &					P
Honors & Awards					P

X = Essential Information

P = Information to enhance your profile

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Social Media Profile Information Worksheet

Username:		Username:	Password:
Personal		Corporate	You can use the same one if you want.
Checker: http://namechk.com/ max 15 characters		Min 8 characters	
Contact Information			
First Name:		Last Name:	
Address:		Current Town / City:	
Postal Code:		Country:	
Phone Number:		Mobile Number:	
Email:		Website URL:	
Security Question & Answer:		Time Zone:	
Personal Information			
Birthdate:		Gender:	Marital Status:
Political Views:		Religious Views:	
Bio / Description / About Me (160 characters max):			
Interests:			
Favorites (Music, TV, Books, Movies):			
Education & Work Information			
College & Year:		High School & Year:	
Degrees Earned:			
Job Title:		Company:	
Current Position & Description:			
Groups & Associations:			
Honors & Awards:			

Funeral Gurus Worksheets

Social Media Strategy — Quick Start

Where You Need To Be	How To Grow Your Network
Facebook: <input type="checkbox"/> Personal Profile <input type="checkbox"/> Company Page	Facebook: - (Request Friend) <input type="checkbox"/> Check friends of most popular friends (right-click) <input type="checkbox"/> Check groups: Local, Business+ Friend's Groups
LinkedIn <input type="checkbox"/> Personal Account <input type="checkbox"/> Company Account	LinkedIn: - (Invite to Connect) <input type="checkbox"/> Check "Classmates" tab <input type="checkbox"/> Search & Check Local Groups
Twitter <input type="checkbox"/> Personal Account <input type="checkbox"/> Company Account <input type="checkbox"/> Obit Account	Twitter — (Follow — don't need to be invited) <input type="checkbox"/> "Find People" Search: City / Town / Airport Code <input type="checkbox"/> Right Column Search: live in (Your Town / Code) <input type="checkbox"/> Twellow.com — Check "Twellowhood"
Option 1: Connect Profiles Together: <input type="checkbox"/> Personal: Facebook > Twitter > LinkedIn <input type="checkbox"/> Company: Facebook > Twitter Option 2: Hootsuite Tool <input type="checkbox"/> Connect All Accounts in Hootsuite	Google+: - (Add People) <input type="checkbox"/> "Add People You Know" <input type="checkbox"/> Add Google+ Widget to Your Website Notes: For all 3 services, use "Find Friends / Contacts" + you can upload a CSV file from Outlook or CRM program. Remember: Respond to mail and direct messages
What To Talk About	How To "DO" Social Media
<input type="checkbox"/> Watch Tutorial: Information Efficiency http://www.funeralfuturist.com/create-your-own-wire-service/ Use iGoogle or NetVibes or other Dashboard services <input type="checkbox"/> Create "Information Dashboard" <ul style="list-style-type: none"> • Seniors Guide • Estate Planning • 55+ • End of Life • Nursing Homes • Hospice • Elder Care • Grief • Your Town, State / Prov. 	Heppell's 4 Quarters Strategy - Facebook 25%: Personal Updates (Facebook or Hootsuite) <ul style="list-style-type: none"> • Show that you are a family person, good member of the community, add photos of local events 25%: Liking, Commenting on Others <ul style="list-style-type: none"> • Congratulate, Birthday Wishes 25%: Disseminating Useful Information <ul style="list-style-type: none"> • Use "Information Dashboard" 25%: Business Updates & Event Promotions <ul style="list-style-type: none"> • Direct friends to Facebook Page / G+ Page • Use an indirect tone when talking about work • Use Facebook Ads to promote Events

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Online Review System

SETUP:

1. Claim your Google Places / Google+ Local, Yahoo & Bing Local pages
2. Create accounts at the following sites: Angie's List, Yelp, Best of the Web, Foursquare, Citysearch, Insider Pages, Merchant Circle, SuperPages, Judy's Book.
3. Create web page called: Submit a Review or Review Us

Sample Wording: We make every effort to make sure that you were satisfied with the services that you received. We are committed to provide the best care possible.

In an effort to continually improve the services that we provide and to let other client families know the level of service they can expect from us, please take a couple of minutes to leave your review at on any of the review websites below (it's easiest if you choose where you already have an account).

[List all of the sites here]

4. Create card below to make available in foyer or in chapel

ACTION:

1. Have your after care staff screen families and select favorable families that seem to be somewhat tech savvy
2. Direct people either to the website page or give them the card (especially people with Gmail accounts)

If you were satisfied with our services, please review us online.

It only takes a few minutes to leave us a review online.



Write your review Wrong labels? X

Quality

Poor - Fair	Good	Very Good	Excellent
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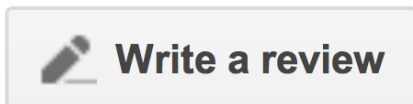
Describe your experience at McCall Bros. Funeral Directors Ltd..

Your review will be posted publicly on the web, under Robin Heppell. [Why?](#)

[Report a problem](#)

Scan this QR code with your smart phone or visit our Google Business page at <http://goo.gl/MkXue>

1. Click the grey "Write a review" button in the top right



2. Sign into or create your Google or Gmail account
3. Fill out the form (sample on right) and share your thoughts about your experiences with our firm

Thank you doing this favor for us.

Your Funeral Chapel Name

Address

Phone number

Email address

Website

Funeral Gurus Worksheets

Online Video Marketing Fast Start Checklist | Time: 60 to 90 Minutes

1. Create YouTube account
2. Get Snagit by TechSmith <http://snagit.com> (only \$49.95)
3. Complete “Online Video Strategies Worksheet”
4. Download PPT Template, Choose Design & Edit for your Funeral Home
5. Download Script & Edit for your Funeral Home
6. Record “Funeral Costs” video with Snagit
7. Upload Video to YouTube (from Snagit)
8. In YouTube edit Title, Description, Tags, set Location re: “Online Video Strategies Worksheet”
9. Email YouTube link to 5 friends and ask them that they watch it to the end (comments, likes a bonus)
10. Repeat steps 3 — 9 for “Cremation Costs” video

Additional Video Training Resources

Case Study: Cremation Costs Champaign Illinois

- <http://www.youtube.com/watch?v=9yI135MpMJ4>

Sample Video: Cremation Costs Champaign Illinois

- <http://www.youtube.com/watch?v=FlvhZluenqg>

Video Cremation with Snagit Demonstration

- <http://www.priceshoppersecrets.com/online> (starts at 7:42 mark of video)

[Members Area] Core Training: Price Shopper Secrets 2.0: Online Shopper Magnet Videos

- <http://www.priceshoppersecrets.com/training/module-5/module-5-video-training>

[Members Area] Online Video Marketing PowerPoint Templates, Scripts, Worksheets

- <http://www.priceshoppersecrets.com/training/module-5/module-5-downloads-page>

Hardware Requirements

Computer: Mac or PC | Internet Connection | Microphone: Built-in or USB: Yeti or Logitech

Funeral Gurus Worksheets

Online Video Marketing Strategy for Funeral Homes: Sample

Main Topic: Cremation Costs in Victoria BC

Destination URL: <http://www.McCallBros.com/cremation-costs/> or YouTube URL

Not necessarily your home page, if video is a specific topic, direct to related page on website

Video Titles: Keywords 1st, Use " | " Pipe to Separate, then Firm name if appropriate, 100 Characters Max

1. Victoria Cremation Costs Explained | What is the price of Cremation in Victoria BC (84 characters)

2. How much does a Cremation Cost in Victoria BC | Victoria Cremation Costs Made Simple (85 characters)

Description:

Suggested length: 200 characters or less, use keyword phrases, always start with your URL including the http://, call to action at end, and then insert the YouTube URL. For YouTube insert your entire script into the Description field with the URLs at the beginning and the end.

<http://www.McCallBros.com/cremation-costs/> If you're looking for info about cremation costs in Victoria BC, it can be quite confusing so this videos makes understanding cremation costs more simple.
[YouTube URL]

Tags: Use 6 keywords to describe video; last 2 or 3 should be somewhat unique to you & to be used in all other videos to link them together.

Cremation, Costs, Victoria, Funeral, Memorial, Society, McCallBros, VictoriaBC

Video File Name: McCalls-Cremation-Costs.mp4

Format: MP4 (H.264 encoding) preferred (others: avi, wmv, mov, mpg) - **Length:** 15 mins. max, 2 – 3 mins. preferred - **Size:** less than 100 MB

Uploading Your Video...

Use Wistia for White Label, Ad Free Videos

Video Sites		Social Bookmark
YouTube	Blip.TV	Del.icio.us
DailyMotion	Veoh	Digg
Yahoo	Viddler	Diigo
MySpace	Vimeo	Google Bookmarks
Metacafe	HowCast	Kaboodle
Revver	5min	StumbleUpon

Promoting Your Video...

- ☐ Have friend view, rate, & comment video
- ☐ Promote it with Facebook / Twitter
- ☐ Tag it with Social Bookmarking Sites
- ☐ Link to it from other sites if possible
- ☐ Create the next Video

Funeral Gurus Worksheets

Online Video Marketing Strategy for Funeral Homes

Main Topic:

Destination URL:

Not necessarily your home page, if video is a specific topic, direct to related page on website

Video Titles: Keywords 1st, Use " | " Pipe to Separate, then Firm name if appropriate, 100 Characters Max

1.

2.

Description:

Suggested length: 200 characters or less, use keyword phrases, always start with your URL including the http://, call to action at end, and then insert the YouTube URL. For YouTube insert your entire script into the Description field with the URLs at the beginning and the end.

http://www.

[YouTube URL]

Tags: Use 6 keywords to describe video; last 2 or 3 should be somewhat unique to you & to be used in all other videos to link them together.

Video File Name:

Format: MP4 (H.264 encoding) preferred (others: avi, wmv, mov, mpg) - **Length:** 15 mins. max, 2 – 3 mins. preferred - **Size:** less than 100 MB

Uploading Your Video...

Use Wistia for White Label, Ad Free Videos

Video Sites		Social Bookmark
YouTube	Blip.TV	Del.icio.us
DailyMotion	Veoh	Digg
Yahoo	Viddler	Diigo
MySpace	Vimeo	Google Bookmarks
Metacafe	HowCast	Kaboodle
Revver	5min	StumbleUpon

Promoting Your Video...

- ☐ Have friend view, rate, & comment video
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- ☐ Create the next Video

Funeral Gurus Worksheets

YouTube Funeral Video Tribute Strategy

Deceased Name: Tom Heppell

Destination URL: <http://www.mccallbros.com/thomas-george-tom-heppell/>

Not necessarily your home page, if possible directly to the deceased's obituary page

Video Title: Keywords: Deceased's Name "Funeral Service Video Tribute" | City, Prov. / State [60 Characters Max.]

Tom Heppell | Funeral Service Video Tribute | Victoria BC

Description:

Always start with your URL including the http://, include a portion of the obituary & make sure there are keywords, end with call to action

<http://www.mccallbros.com/thomas-george-tom-heppell/>

Thomas George "Tom" Heppell Celebration of Life Video Tribute.

[Include obituary excerpt. Make sure to include keywords.]

This service is provided by McCall Bros. Funeral Home & Cremation Services, Victoria, BC

To read Tom Heppell's complete obituary and to read and share condolences, visit:

<http://www.mccallbros.com/thomas-george-tom-heppell/>

[YouTube URL]

Tags: Use 6 keywords to describe video; last keyword should be somewhat unique to you & to be used in all other videos to link them together.

Tom Heppell, Funeral, Video, Tribute, Victoria, BC, McCallBros

Video File Name: Tom-Heppell-Video-Tribute.mp4

Format: MP4 (H.264 encoding) preferred (others: flv, avi, wmv, mov, mpg) - **Length:** 10 mins. Max. - **Size:** less than 100 MB

Steps to promote and distribute Tribute Video...

- ☐ Upload video file to YouTube and fill out fields with information above
- ☐ Embed YouTube video in obituary post on funeral home website (make sure to uncheck "Include Related Videos")
- ☐ Include on Memorial Folder: "To view Memorial Tribute Video, visit: www.YourFuneralChapel.com/john-doe"
- ☐ After funeral, email link to YouTube page and link to Obituary to all family members that have email addresses
- ☐ Instruct family how to add YouTube video to their Facebook profile (same as adding Obit to Facebook profile)
- ☐ Add YouTube video to funeral home Facebook page

Important Note: Ensure that music for video tribute is royalty-free & will not infringe copyright laws.

Funeral Gurus Worksheets

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Important Note: Ensure that music for video tribute is royalty-free & will not infringe copyright laws.

Funeral Gurus Worksheets

10 X 10 Q & A Formula

Most Frequently Asked Questions (Ask The Director)	Questions Client Families Should Ask (They don't know what they don't know)
1. How much is a funeral?	1. What is the benefit of viewing the body?
2. Do I need a casket with cremation?	2. What is the difference between corporate and family owned funeral homes?
3. How do I know that I get Mom's ashes back?	3. Can I have a reception even if Dad didn't want a service?
4. Why are funerals expensive?	4. Does the funeral home own their own crematory?
5. Do you have to be embalmed if you are cremated?	5. What are the drawbacks to using my own container vs. a cremation urn provided by the funeral home?
6. Dad never attended church; do we have to have a minister to have a funeral service?	6. Do you video record the service?
7. Can family members participate in the service?	7. Does your funeral home offer a "No Hidden Fee" guarantee?
8.	8.
9.	9.
10.	10.
What You Need...	What To Do...
<input type="checkbox"/> Write out all of the Questions and Answers	<input type="checkbox"/> Record the Videos
<input type="checkbox"/> Create 3 or 4 PowerPoint slides for each question	<input type="checkbox"/> Upload to Video Sharing Sites
<input type="checkbox"/> Screen capture software (Camtasia / SnagIt)	<input type="checkbox"/> Title videos: Funeral Questions [City] [Question]
<input type="checkbox"/> YouTube account for Video Sharing	<input type="checkbox"/> Place URL at the beginning of each description
<input type="checkbox"/> Purchase URL [City]FuneralFacts.com	<input type="checkbox"/> Repurpose written FAQs as articles / blog posts

Funeral Gurus Worksheets

10 X 10 Q & A Formula	
Most Frequently Asked Questions (Ask The Director)	Questions Client Families Should Ask (They don't know what they don't know)
What You Need...	What To Do...
<input type="checkbox"/> Write out all of the Questions and Answers	<input type="checkbox"/> Record the Videos
<input type="checkbox"/> Create 3 or 4 PowerPoint slides for each question	<input type="checkbox"/> Upload to Video Sharing Sites
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<input type="checkbox"/> Purchase URL [City]FuneralFacts.com	<input type="checkbox"/> Repurpose written FAQs as articles / blog posts

Funeral Gurus Worksheets

Staff Bio Worksheet

This worksheet will help you to gather information to complete the Staff Directory. Have all full and part time (especially ones who will be in contact with the public & clergy) staff members complete this document. Before distributing to staff, remove any criteria that you deem unnecessary / undesired.

Primary Staff Member Information

Full Name:	Designations / Degrees:
Position:	Licensing Status:
Email:	Office Phone:
Direct Phone:	Cell Phone:

Employment Information

Year Started in Funeral Service:	Year Started with Firm:
Funeral Training (school / program):	
Previous Employment (if appropriate):	

Background Information

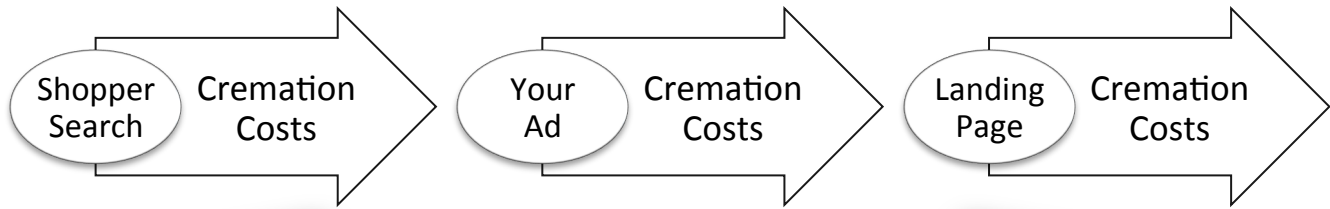
City Born:	City Raised:
Additional info:	
Hobbies:	
Community Involvement:	
Family Activities:	
Other information:	

Completed Biography

Completed Biography

Funeral Gurus Worksheets

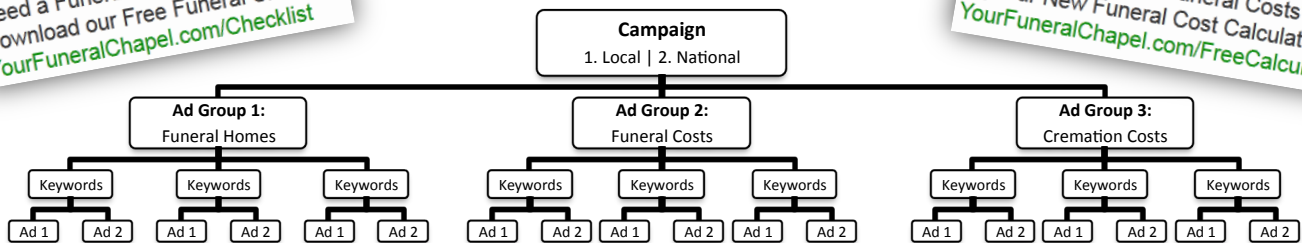
Successful Search Scenario: Maintain Congruency of the Search



Google AdWords Campaign Structure

Has Someone Just Died?
Need a Funeral Home in Your Town?
Download our Free Funeral Checklist
YourFuneralChapel.com/Checklist

Funeral Costs in YourTown
Are You Looking for Funeral Costs?
Try Our New Funeral Cost Calculator
YourFuneralChapel.com/FreeCalculator



Funeral Homes

Funeral Costs

Cremation Costs

Negative Keywords: Pet, Pets, Dog, Dogs, Cat, Cats, Obit, Obits, Obituary, Obituaries, "Death Notice", "Death Notices" - (Be Aware of Sister Cities and Terms)

Points to Remember

- Enter the conversation already going on in their mind and maintain that conversation!
- SELL the CLICK, not the CALL!
- Use "Free" Assets like downloadable forms, checklists, templates, worksheets
- Track your Ads with Google Analytics & Tracking Phone Numbers
- Super Strategy: Your Firm Name as negative keyword in main campaigns and then create a campaign solely for your name (optional)
- I vow NOT to just "Buy Traffic" and vow NOT to send Paid Traffic to my Home Page!

Funeral Gurus Worksheets

Funeral Gurus Membership Website

It is a private, membership website for you and your staff that will provide you – on an ongoing basis – training and resources that other funeral homes have successfully put into action and benefited from.

There is an ever-growing collection of funeral-specific audios and videos that can educate you and your team from past training programs and recorded presentations and webinars to new content updated weekly that can be used for staff meeting content and other staff training. Plus, when applicable, there will be action guides, checklists, templates and scripts to support the training so that any initiatives can be implemented as easily as possible.

There is also a repository of ready-to-use resources from the Van Beck Library, Anderson-McQueen Vault and Funeral Futurist Databases that you can access instantly such as:

- Sample Funeral & Cremation Packages
- Lunch & Learn PowerPoint presentations and scripts
- Job Description templates
- Competition Tracker & Price Point Analyzer Excel spreadsheets
- Google AdWords sample ads and keyword lists
- Client family surveys, cremation forms and many more resources
- Plus new resources will be added every month

Our goal is that you and your staff will have a go-to place to assist in the creation of Magic Bullet Funeral Directors!

Being a member of the Funeral Gurus, you and your staff can...

- Plan staff meetings with ready-to-use content to help you train staff and implement initiatives
- Create a Speakers Bureau for your community outreach program with a complete set of resources including introductory letters, promotional posters, PowerPoint presentations and speaker's script
- Improve your website's SEO (Search Engine Optimization – ranking higher in Google) by executing a content marketing plan from a series of worksheets and instructions that contain templates that just need to be edited for your firm
- Train all of your team including the administration staff with Todd's Telephone Etiquette program
- Create cremation packages to present to client families based on proven packages that increase average funeral values
- Receive 6 CEUs per year for 5 of your licensed personnel – plus receive at least 1 CEU per month towards your CFSP designation

If you or your staff are able to set aside two hours per week to review and implement just one initiative per month, after one year we believe that you will receive over \$10,000 of value in training programs, increased revenues and creating a more valuable team.

All memberships come with 30 Day, 100% Satisfaction Guarantee. So you can access the entire membership site, watch all of the training, download all of the resources and if you feel that you haven't received the value that you were expecting by 30 days, we will refund 100% of your registration fee. Also you can cancel at anytime and you won't be billed in the future.

Interested in becoming a member of Funeral Gurus? Go to <http://FuneralGurus.com/join> & use code: **IFHV** to save!