

First Call Ice Breaker Email

Why Email Immediately After 1st Call?

If you do, you will...

- Make your client family more prepared for the arrangement conference
- Have a better opportunity of having them choose better service offerings
- Increase the sales of new services & merchandise
- Enjoy a better overall arrangement process

Create Web Page: Information to Review Prior To Our Meeting

Thank you for the confidence that you have placed in [Firm Name].

We like to let families know ahead of time the various items that will need to be discussed during the arrangements. We have categorized them into four groups:

Information You Need

- Statistical information
- Social Security Number
- Cemetery information
- Family Contact Information

Also if you haven't already seen our If A Death Has Occurred checklist, you can review it here ([link to page on your website](#)).

Things You Need To Bring In

- Clothing (including any special instructions) – Clothing Guidelines
- Photos for the video collage (Video DVD Tribute) – see sample here
- Veteran Discharge papers if applicable

Decisions You Will Have To Make

- Burial or cremation
- Location of service
- Choosing a clergy or celebrant
- Location of reception

Introduction To New Services

- Complimentary Online Obituary – see current obituaries here
- Video DVD Tributes – see sample here
- Catering and Beverage Service – more details here
- Memorialization & Cremation Jewelry

Note: The content of this page should be edited to fit the offerings of your funeral home. The key thing is to get this page up and running as soon as possible so that you can implement this strategy right away. You can always add to it or edit it in the future.

Suggested New Offerings

- Free Online Obituary
- Memorial Video Tribute DVD
- Catering Package
- Reception Room Usage
- Cremation Jewelry
- Fingerprint Jewelry
- Memorial Blanket
- Tribute Portraits
- Executors Toolkit
- Stuffed animals
- Picture frames
- Memorial candles

Email to send to Client Families

Subject: Information to review prior to our meeting

Dear ###,

Thank you for confirming your appointment with us to discuss the services that you want to have for your ###.

We like to let families know ahead of time the various items that will need to be discussed during the arrangements. We have created a web page specifically for client families like yours so that you have some insights into the process of funeral and / or cremation arrangements. You can access that web page here: [LINK TO YOUR PAGE]

Included on this page are a list of information and items that you may need to bring with you, some discussion on some of the various decisions that you will need to make, and a listing of some of the newer service offerings that we have available that you may not be aware of.

Also at any time - now or during the arrangements or after - we are always available to answer questions that you may have.

Sincerely,
[Funeral Director]

Implementation process at funeral home

1. Chose a staff member (champion) who will be responsible for this strategy? _____
2. Create a page (this page should be a hidden page on your website if possible) called "Information To Review Prior To Our Meeting"
3. For every 1st Call, ask for their email address during the initial call
4. Send the following email to the family / next of kin / person making arrangement immediately after receiving the 1st Call