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5 Points To Consider For Your Pre-Need Sales Strategy

info@plotbox.io
plotbox.io

Introduction

While the early stages of the pandemic undoubtedly presented a huge challenge for pre-need cemetery sales - limiting the ability of sales teams to get their message in front of customers, the increased awareness of death and mortality in hearts and minds have arguably created a growth in the pre-need opportunity.

Before embarking on any new pre-need program, it's important to have a clear picture of what your goals are and how you're going to achieve them - focusing your efforts and engaging your teams. With that in mind, here we outline 5 points to consider for your pre-need sales strategy:

1 | Identify your audience
2 | Plan your pre-need program
3 | Maximize your touchpoints
4 | Nurture your leads
5 | Streamline your sales processes

1 | Identify your audience

Create a target audience profile

Start by asking yourself a few questions: who will benefit most from pre-need planning? What does your ideal pre-need customer look like? What does the pre-need market look like and where is it going? What conversations are your sales teams having and what are your customers telling them? Who is expressing an interest in pre-need and are there trends emerging in what they have to say?

This will start you on the path to defining your target audience. To get a little more strategic, it can be helpful to try and understand:

Who are they? (Demographics)

What's their age, gender, religion, socio-economic group, income, occupation, community background. Do they tend to be older, retired persons putting their affairs in order, or are you seeing a broader spread of interest in pre-need in the wake of Covid-19?

Where are they? (Geographical)

City, state, local community, rural? How far do you want to spread your message? Will you focus on your local area, or are there opportunities in widening your scope?

If you wanted to break that down even further, you may want to look at:

What are their buying habits or behaviors? (Behavioral)

How are they engaging with your business, what are their needs and what influences their buying decisions? What are they looking for in products or services - the 'benefits sought'?

What are their interests, values and opinions? (Psychographic)

Customer interests or habits will tell you why they buy certain products or use particular services - what are their drivers?

All of these together will help you to build a picture of your ideal customer - a picture that will help you to tailor your marketing activities and shape your message.

You may find it useful to carry out some market research, undertake surveys, or use local census information.

You might also want to gather information from hosted events to get a real sense of your customers' needs.

From an online perspective, try analytical tools such as google analytics to measure activity on your website and social media channels.

This will help you to ascertain where traffic is coming from, how long users are staying and what they're interested in learning about.

Leverage existing data

You should also consider leveraging the data you already hold as it can provide you with a wealth of useful knowledge.

Knowing, for example, the community make up or religious backgrounds of current families or service users can help you to target activity towards specific groups of people. If they're not engaging with you, is there a way you could be catering more towards them? What are the reasons you aren't seeing as much engagement among them and how could you address that?

It can also help you to build target lists: deed owners, memorial lease owners or families, for example.

You could already be sitting on a gold mine of information that if used in the right way can help to maximize your marketing efforts.

The generation gap

When thinking of your audience, one size won't always fit all - so it's also worth remembering the differences between age groups in terms of how and where they consume their media, as well as what influences their decision-making and buying habits.

Even within a single family unit, there could be the 'Baby Boomer' beginning to embrace technology but with a mix of how and where they research for goods and services; the techno-literate 'Gen X-ers' who use email as a primary communications tool; and the 'Millennials' who primarily use online and social media and who increasingly have influence over buying decisions

Read our blog on marketing to different generations.

2 | Plan your pre-need program

How are you going to educate your audience of the benefits of pre-need and build awareness on what you have to offer?

Create a marketing plan

First, start with your business goals.

Clearly define what it is you want to achieve. Make your goals measurable and achievable - and importantly, closely aligned to your overall business objectives.

That could be for example:
Increase pre-need sales by x% this financial year

Now we have a business goal that's clearly measurable. How are you going to achieve that?

Next, define your marketing strategy.

What's the 'big idea'? Broadly speaking, that will be how you'll achieve your goals, for example:
Generate new leads by building awareness through local community engagement

Then, agree your marketing plan.

This is made up of the specific steps you're going to take to make the strategy happen in order to meet your goals.

These are the campaigns you use, the tactics you employ - the 'what', 'where' and 'when', for example:
Highlight the benefits of pre-need funeral planning through direct mail newsletters, targeted social media campaigns and a programme of on-site community events

The right approach

The key is to find the approach that works best for you. A successful pre-need program won't necessarily require huge teams of marketing experts with limitless resources - use what you have available to understand your audience and how best to reach them. At its heart, it's about generating awareness and engagement by building relationships with your audience.

Consider the marketing channels that work best for you - what are the best ways to get your message in front of your customers? Is it newsletters, emails, print advertising, paid social media ads, hosted events?

For some, that may be growing word of mouth by engaging with your local community, exploring networking opportunities, partnerships or community events, supported with leafleting campaigns or direct email marketing.

For others, that may be increasing your online presence through targeted social media ad campaigns, Search Engine Optimization (SEO), keyword targeting, or content marketing - all driving traffic to your website.

For most, it will be a combination of all of these things, which brings us to...

Lead generation

As we discussed, in our lead generation blog, it's important to consider a multi-channel approach when attracting leads - one that utilizes a combination of both online and traditional methods - and one that accounts for the preferred methods of communication of your target audience.

Are you doing everything you can to engage people? Think carefully about how you're currently reaching people, and if you're providing the information they need:

- Do people call into the office?
- Are community events successful?
- Does your website get lots of traffic?
- Do people engage with your social media posts?
- Do you produce a bulletin or newsletter?
- Do you provide printed brochures with info on pre-need plots?

Consider how you can best utilize those opportunities in respect of your audience. Some people, for example, may prefer bulletins to updates on social media. How can you make that available to them? Are they printed or emailed to a list of people? Similarly, if you know that your audience uses facebook, try scheduling a series of posts that encourage engagement, with a call out to sign up to a newsletter.

Create a campaign calendar

Whatever you decide will work best for you, a useful step is to create a calendar for planning campaigns - it will help you and your teams to focus your efforts, seeing clearly what needs to happen when.

Some examples might include:

Holiday campaigns: Christmas, Easter, Father's Day, Mother's Day, Memorial Day, Remembrance Sunday - they all provide opportunities for marketing campaigns.

Cemetery Events: advertise and host - they're great for engaging with families and your local community.

Monthly or Quarterly Newsletter: send this out via email - keep it simple and straightforward, try using social media to promote and provide a compelling reason to provide their email address.

Condolence letters or emails: consider the opportunity in Aftercare. Pull a report on upcoming anniversaries, send an email with a personal message and a link with directions to their loved ones grave to share with friends or family.

3 | Maximize your touchpoints

A touchpoint is essentially any point of contact or interaction with your customer. That could be meeting with a sales person at an event, a phone call into the office, a visit to your website, engaging with a social media post, reading a leaflet, viewing an ad or reading a thank you email.

Touchpoints can occur before, during or after purchase and are important because they provide an opportunity to influence the decision making process and build and maintain positive relationships.

You won't always get a second chance to influence that decision, so it's important that each of your touchpoints work for you in the right way:

Are your sales counselors prepared with the right pitch? If someone calls, do you have all of the information you need at your fingertips? Are your ads appearing in the right places at the right time and do they reflect the right messages? Do they provide the customer with everything they need to know? How and where can people find out information about what you provide? Are you answering the questions they need?

Digital touchpoints

As we increasingly go online to research purchase options, the number of digital touchpoints is growing - that's more opportunities for you to interact with and influence potential customers.

For you, that may most typically be your website. Think about what that looks like from the customer's perspective:

- When they land on your homepage, what impression do they get?
- How easy is it to get what they need?
- Can they download information to read later?
- Is the interaction a seamless one?
- Can they navigate easily to where they need to go?
- Are there any broken links or missing information?
- Is there anything hindering their progress?
- How easily can they get in contact to learn more?

To put it another way:
Is the experience as user-friendly as it can be?

Data capture

Your digital touchpoints also provide you with an excellent opportunity to capture data - data that you can then use to turn this one way interaction into a two-way conversation, build the relationship with targeted information, and intuitively move your lead through their customer journey.

But for now - let's ask another question:
Are you currently capturing leads on your website?

If not, it's time to start.

Something as simple as a 'would you like to learn more?' pop-up button on your homepage, or a 'sign up to our newsletter' form could potentially turn a lead into a prospect.

A lead capturing form asking how or when someone would like to be contacted can also help with personalization, and even create a background trigger for your sales team to follow up.

CTAs

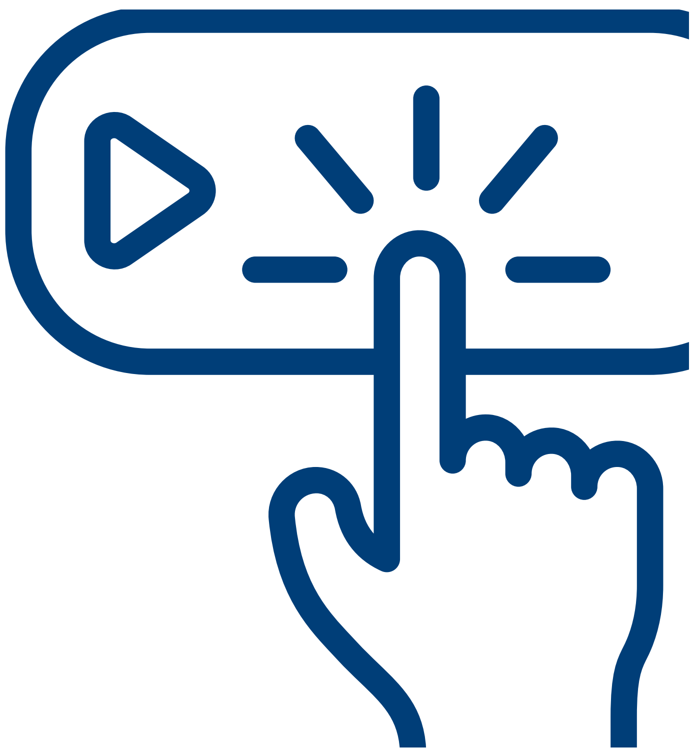
CTAs, or 'Call to Actions' are prompts encouraging your audience to take some form of action and can appear on your website, landing pages, emails, ads etc.

Consider what actions you would like someone to take. What's important to you? Is it sign ups for attending community events? Subscribers to your newsletter? Enquiries about pre-need plots? Provide a compelling reason to click and you'll soon be growing your contact lists.

Gated content

Gated content is another good way of generating leads and turning them into prospects. It requires the user to provide some form of personal information, usually by completing a form, before gaining access to useful information.

Top Tip:
Always aim to capture an email in return for offering something of value.



4 | Nurture your leads

So now that we have our leads, and our leads are becoming prospects - how do we convert them into customers? How do we maximize the sales opportunity we've created?

Lead nurturing is really about how you build, develop and maintain relationships with your prospective customers. At a basic level, that means providing them with the right information at the right time in the right way in order to influence their buying decisions.

That also means keeping track of engagements and managing the data you have in a way that keeps your leads 'warm'. So how can we do that?

CRM (Customer Relationship Management)

First, a question:
What is your main source of recording information? Is it in a black book, on a spreadsheet, or some other manual paper system?

If you are, your first step should be to start recording your interactions digitally. If you're not, you're missing out on the visibility, collaboration and reporting benefits of a CRM.

A CRM (Customer Relationship Management) system is a tool that allows you to track, manage and analyze all interactions with leads throughout their customer lifecycle.

Whether it's someone walking into your office, expressing an interest in a piece of content on your website, or completing a submission form, a CRM tool will allow you to stay connected with your customers throughout every stage of the customer journey.

Why is that important?

Because not all leads are created equal.

At this point your lead will have expressed some sort of interest in what you do. However, they may not be ready to make a purchase - and they may not all be interested in exactly the same things.

A CRM will allow you to segment your leads in order to create personalized campaigns - such as an email marketing campaign - that provide added value, with content that's tailored to their needs.

If a customer isn't ready to buy, it's important to maintain a connection with them - understanding what's important to them and speaking directly to their needs.

A CRM will even let you automate email marketing campaigns, streamlining processes and freeing up time for your sales teams.

Remember: people will spend time thinking about a decision as important as pre-need planning.

The key point here is to hold their interest by continuing to share information about what you do and how you can help to meet their needs.

Measure what's working

A CRM also gives you the opportunity to track trends and growth - letting you clearly see what's working and just as importantly, what isn't.

How are people finding you? At what stage might you be losing leads? What tactics are working for you? Armed with this knowledge, you can adopt the strategies that work best for you.

You can learn more about CRM in our [7 Best CRM Features for Cemeteries eBook.]

INSIGHT...Not all leads are created equal. A CRM will let you segment your leads and tailor your messaging.

5 | Streamline your sales processes

So...you've carried out all of this great work in getting your message out there. Your marketing plan is working and you're starting to generate and nurture leads; your teams are getting in front of prospects, and people are interested in what you have to say.

Now ask yourself a question:

How easy is it for those potential customers to sign on the dotted line?

Analyze your current processes

Take a look at each step in that process. In the broadest sense - what needs to happen?
Then ask yourself a few important questions:

Is there anything that could potentially slow that down? Are there any steps that are taking longer than they need to? Are my systems joined up? Are we duplicating tasks? How many people need to be involved in each step? Do my sales teams have easy access to all of the information they need? Are they able to provide customers with everything they need to make a decision?

In a nutshell: Where do I need to get to and how easy is it to get there?

Adopting technology

Streamlining sales processes will help to increase efficiencies, improve communication and minimize risk of errors - and in terms of pre-need it will remove barriers and help to provide an experience for your customer that is as seamless as possible.

Adopting a technological solution is one of the best ways in which you can do that. Why? Because it will provide you with the right information in the right place at the right time.

Consider what an appointment looks like:

What does a sales counselor need, and what does a family need to know? To go back to our earlier question, in a literal sense - how easy is it to sign a contract?

At a minimum, your sales counselor needs a clear picture of exactly what's available to sell and where, a way of articulating that, the information at their fingertips to answer any questions that may come their way, a way of processing payments - and drawing up a contract.

Your family will need visibility of what's on offer, information on payment options and contract types - and a way of signing a contract.

Having a solution that provides real time inventory data, linked to high resolution digital maps and related status information allows sales teams to see at a glance exactly what's available and where - minimizing time spent verifying space and eliminating confusion.

It also lets families see exactly what they're getting - removing any uncertainty or second-guessing.

And having this information accessible remotely means that sales aren't limited to the office - they can be carried out in-home or even on cemetery grounds (think of the eventing opportunity for pre-need!).

What does drawing up a customer contract currently look like? Are you cross-checking multiple systems, generating reams of paperwork?

An online contract management solution, such as PlotBox, provides quick and easy access to your records, your inventory and your cemetery maps.

That means counselors can check availability quickly, place a plot on hold and even upload scanned images to contracts, apply discounts, packages and group fees, as well as work out monthly payments, plus provide information on payments, balances and settlements.

Essentially, everything they need to generate a purchase contract 'on the spot'.

Reduce the risk of error

Having multiple people selling at once may also increase the chance of double-sold plots - a real risk for cemetery operators. Inventory data updated in real time can help to reduce the chance of administrative errors, eliminating this risk, and providing sales counselors and customers with even greater confidence.

Further reading and resources

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blog.plotbox.io/

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For more on lead generation, check out our **Lead Generation eBook**

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info@plotbox.io
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