

5 ways to streamline your pre-need sales

#1 Create a single source of truth.

Having all of your data linked and stored in a single, integrated system allows you to manage information in a way that helps you to provide customers with everything they need to make informed choices. We're more connected than ever and expectations are changing - remove barriers and place yourself in the best position to meet those changing needs.



#2. Update inventory in real time.

A solution that provides real time inventory data will empower sales teams by allowing them to see at a glance exactly what's available and where - minimizing time spent verifying space and eliminating confusion over available inventory. Data updated in real time also reduces the risk of double-sold plots, providing sales counselors and customers with even greater confidence.

#3. Utilize CRM.

A CRM (Customer Relationship Management) tool will allow you to track and analyze all interactions throughout the customer lifecycle. It helps to manage relationships by providing key insights and helping to ensure your leads don't go cold, allowing you to communicate in the right way at the right time.

Streamlined data management

Relationship building

Sales forecasting

Monitor sales team activity

Meaningful reports



#4 Provide contracts 'at-home'.

Providing sales teams with access to a cloud-based contract management solution will allow them to sell from anywhere on any device, giving the ability to write up a contract 'on-the-spot.' All contract information available at their fingertips, including payments, balances and settlements. The easier you can make it for a family to make a decision and sign on the dotted line, the better.



#5 Explore the genealogy opportunity.

People are increasingly looking online to find the graves of loved ones and to research their ancestry. Linking your deceased records to searchable digital maps provides added value, opens you up to a wider audience, and potential new revenue streams.

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