

Outreach Tips from a Recovering Realtor

Consistent interactions with community members and previously served families can be a catalyst for repeat business and even a meaningful form of aftercare.

BY CRYSTAL WEBSTER



Maya Angelou once said, “People will forget what you said, but people will never forget how you made them feel.”

As funeral professionals, we know this is true. Families likely won’t remember the exact placement of the flowers or precision of the paperwork, but they will never forget the care and respect you showed their loved one or the comfort you provided them. Why, even after all the care, support and time we give families, does society still treat these deeply personal funeral services as transactions?

The average family plans a funeral every seven to 12 years. Do you know what else families do every seven to 12 years? Buy a house.

Let’s explore and extrapolate a tried-and-true strategy used by real estate agents to stay involved in their communities and past clients’ lives. The approach builds trust and cements a robust referral business.

Don’t worry – this is coming from an award-winning, multimillion-dollar-producing former real estate agent. So, I’ve been there, done that.

Realtors: They’re Just Like Us

I understand if you’re skeptical. Current resting places and final resting places are vastly different. Upon further inspection, though, the similarities between the services are surprising and numerous, even beyond the aforementioned seven-to-12-year timelines.

Both professions are locally and community based.

In both lines of work, there is no alternative solution when a family requires these services.

Both require a specific energy and personality to sell services and hold space for families’ wishes.

These aren’t 9-to-5 jobs; nights and weekends are required, as is a balance between your professional and personal needs.

For both, families rarely feel prepared but rather overwhelmed and unsure when they begin working with you.

Because we love what we do, both sets of professionals are constantly learning, adding credentials and becoming the best we can be.

Respectfully, though, the “alphabet soup” of credentials surrounding our names is only understood by other professional insiders, not the families we serve. Accolades, certifications and degrees aren’t necessarily going to be what brings them in the door.

How do we inspire them to choose, remember and refer our services? Stay connected through regular, personal and meaningful interactions – what we called “touches” during my real estate days.

Research shows that 33 interactions, or touches, per year is the optimal number for establishing trust. That’s one interaction roughly every 11 days. This can be just about any form of communication:

- Texts
- Emails
- Phone calls
- Handwritten notes or letters
- Mailers
- Freebies, such as magnets or calendars
- In-person conversations
- Personalized social media contact
- Invitations to events

Thirty-three times a year, more than twice a month, might seem a bit overwhelming at first, so let’s break it down into more specific, palatable ideas.

Special Touches

Look at events or promotions you already have planned for the year. Maybe it’s a Veterans Day gathering, Mother’s Day brunch for the bereaved or candle-lighting remembrance ceremony. What organizations are you sponsoring – a Little League team or, perhaps, the local high school’s spring musical? Put those events or start dates on the calendar, then send out invitations a few weeks beforehand. If it’s an especially large-scale event, consider a second touch in a different style, such as an email invite followed up with a phone call.

Many touches can be prepared in advance, then automated or scheduled. Plus, there are plentiful evergreen resources, both inside and outside the funeral service, that can be used when you don’t have ideas or upcoming events.

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Say you learn something at a convention that your community would find interesting – make it a touch. A new business is opening next door – make it a touch. Your firm receives a

special award or accolade – make it a touch. Hire a team member or receive a new certification – make it a touch. Show you care long after a service is complete and that you’re continually improving to serve families better in the future.

And touches don’t need to be deathcare-centric, though I wouldn’t suggest straying too far too often because you want to stay top of mind for the services you offer, specifically. For example, I often look through “national day of” calendars online and find something to “celebrate.”

On National Pickle Day in November, you could send out a pickle-shaped magnet and a note that says, “Don’t leave your family in a pickle! Schedule your preneed meeting today.”

Death and grief are heavy and emotional, and only you can decide what messaging matches your brand voice. That said, professionalism, light-heartedness and cleverness can coexist if done well.

You can rinse and repeat many of these touches with minimal adjustments each year. Try a few things to see what resonates. Perhaps your community responds best to playful, punny interactions, or maybe they gravitate toward more serious, highly informational touches. They might also display preferences regarding modes of communication (e.g., phone calls versus mailers).

Consider, too, partnering with other local businesses, especially if they can be utilized by the families you serve outside of a funeral-planning context. Share the wonderful work of your caterer, florist, clergy or death doula.



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Implementing Interactions

This isn't all or nothing. For trial touches, select a handful of past clients and community members with whom you work closely. Use a mix of the aforementioned touch types and styles

(you don't want *everything* to be an email; that's not special, just spammy) to see how it goes. As you get comfortable with the system, include more families and experiment with your interactions.

Be hands on at the start, beginning with a manual organization system – maybe a calendar, spreadsheet or file folders. Once these biweekly interactions become integrated into your business practices, add them to your CRM system or even outsource them to a contractor or part-time employee. And, of course, you'll want to survey and track public response all the while.

The intention is to find ways to stay top of mind with the families you've served because, after all, the cost of acquiring a new client can be seven times higher than retaining one. These touches are a form of aftercare, which consumers say they want more of, by the way. They're a way to serve families throughout their continued mourning and grieving processes. If this strategy just so happens to make you look like an expert community leader and save you time, energy and money, too, then that's a win-win-win. ☰

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Crystal Webster, cofounder and chief "grief-to-growth" officer of Sharing Solace, turned her personal grief into a mission to support others navigating their own unique loss journeys. Inspired by the very brief yet impactful life of Webster's daughter, Madelyn Elizabeth, Sharing Solace was created to empower griever to grieve and lovers to love griever through technology-elevated, pass-on-able gifts wrapped in a community of strength, support and resources. Contact her at crystal@sharingsolace.com.

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