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| 2014 Virtual Marketing Calendar | | | | | |
| Dec 30: New Years Day | | |  | | |
| Jan 6: | | | Jul 7: | | |
| Jan 13: | | | Jul 14: | | |
| Jan 20: Martin Luther King Day | | | Jul 21: Parents Day | | |
| Jan 27: Chinese New Year | | | Jul 28: Int. Friendship Day/Sisters Day | | |
| Feb 3: | | | Aug 4: | | |
| Feb 10: Valentine’s Day | | | Aug 11: | | |
| Feb 17: President’s Day / Funeral Marketing Blueprint II | | | Aug 18: | | |
| Feb 24: | | | Aug 25: | | |
| Mar 3: | | | Sep 1: Labor Day / Grandparents' Day | | |
| Mar 10: | | | Sep 8: Suicide Prevention Day | | |
| Mar 17: St. Patrick’s Day | | | Sep 15: Int. Day of Peace/ Stepfamily Day/Citizenship Day | | |
| Mar 24: National Doctor’s Day | | | Sep 22: Rosh Hashanah | | |
| Apr 1: Holocaust Remembrance Day | | | Sept 29: World Vegetarian Day | | |
| Apr 7: | | | Oct 6: Child Health Day | | |
| Apr 14: Good Friday/Passover | | | Oct 13: Thanksgiving (CDN) / Columbus Day | | |
| Apr 21: Easter / Earth Day / Arbor Day | | | Oct 20: United Nations Day/National Nut Day | | |
| Apr 28: Int. Day of Mourning /May Day | | | Oct 27: Halloween / All Saints Day | | |
| May 5: | | | Nov 3: Islamic New Year | | |
| May 12: Mother's Day/Armed Forces/Peace Off. Mem. Day | | | Nov 10: Remembrance Day (Canada) / Veterans Day | | |
| May 19: Victoria Day (Canada) | | | Nov 17: | | |
| May 26: Memorial Day / Nat. Senior Health & Fitness Day | | | Nov 24: Thanksgiving (US) / Hanukkah / World AIDS Day | | |
| Jun 2: | | | Dec 1: | | |
| Jun 9: Father’s Day / Flag Day | | | Dec 8: Human Rights Day | | |
| Jun 16: Hospice Founder Saunders B-Day | | | Dec 15: | | |
| Jun 23: Ramadan | | | Dec 22: Christmas/ Boxing Day | | |
| Jun 30: Canada Day / Independence Day | | | Dec 29: | | |
| FAQ / QSA Video | | How To / Checklist / Guide Article | | Funeral Home Radio Show | |
| 🞐 | 🞐 | 🞐 | 🞐 | 🞐 | 🞐 |
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**Social Media is 1 of the 6 Forces to Funeral Domination Online.**

**To find out more about the other 5 Forces, visit:** [**www.FuneralFuturist.com/go/6-forces**](http://www.FuneralFuturist.com/go/6-forces)

**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)

****

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

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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 Characters | At least 6 Characters |
| 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 & Associations |  |  |  |  | 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/**](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: | | | |

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| Social Media Strategy – Quick Start | |
| Where You Need To Be | How To Grow Your Network |
| Facebook:  ❑ Personal Profile  ❑ Company Page | Facebook: - (Request Friend)  ❑ Check friends of most popular friends (right-click)  ❑ Check groups: Local, Business+ Friend’s Groups |
| LinkedIn  ❑ Personal Account  ❑ Company Account | LinkedIn: - (Invite to Connect)  ❑ Check “Classmates” tab  ❑ Search & Check Local Groups |
| Twitter  ❑ Personal Account  ❑ Company Account  ❑ Obit Account | Twitter – (Follow – don’t need to be invited)  ❑ “Find People” Search: City / Town / Airport Code  ❑ Right Column Search: live in (Your Town / Code)  ❑ Twellow.com – Check “Twellowhood” |
| Option 1: Connect Profiles Together:  ❑ Personal: Facebook > Twitter > LinkedIn  ❑ Company: Facebook > Twitter  Option 2: Hootsuite Tool  ❑ Connect All Accounts in Hootsuite | Google+: - (Add People)  ❑ “Add People You Know"  ❑ 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 |
| ❑ Watch Tutorial: Information Efficiency  http://www.funeralfuturist.com/create-your-own-wire-service/  Use iGoogle or NetVibes or other Dashboard services  ❑ Create “Information Dashboard”   * Seniors Guide * Estate Planning * 55+ * End of Life * Nursing Homes * Hospice * Elder Care * Grief * Your Town, State / Prov. | H**eppell’s 4 Quarters Strategy - Facebook**  25%: Personal Updates (Facebook or Hootsuite)   * Show that you are a family person, good member of the community, add photos of local events   25%: Liking, Commenting on Others   * Congratulate, Birthday Wishes   25%: Disseminating Useful Information   * Use “Information Dashboard”   25%: Business Updates & Event Promotions   * 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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| 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](http://www.YourFuneralChapel.com/articles) |

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| 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 Jing 7. Upload Video to YouTube (from Jing) 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=9y1135MpMJ4>   **Sample Video: Cremation Costs Champaign Illinois**   * <http://www.youtube.com/watch?v=FlvhZIuenqg>   **Video Cremation with Jing 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 |

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| 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. |

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| YouTube Funeral Video Tribute Strategy |
| Deceased Name: |
| Destination URL: |
| 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.] |
|  |
| 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 |
|  |
| 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. |
|  |
| Video File Name: |
| **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. |

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| 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… |
| ❑ Write out all of the Questions and Answers | ❑ Record the Videos |
| ❑ Create 3 or 4 PowerPoint slides for each question | ❑ Upload to Video Sharing Sites via TubeMogul |
| ❑ Screen capture software (Camtasia / Jing) | ❑ Title videos: Funeral Questions [City] | [Question] |
| ❑ TubeMogul.com account for Video Sharing | ❑ Place URL at the beginning of each description |
| ❑ Purchase URL [City]FuneralFacts.com | ❑ Repurpose written FAQs as articles / blog posts |

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| 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) |
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| What You Need… | What To Do… |
| ❑ Write out all of the Questions and Answers | ❑ Record the Videos |
| ❑ Create 3 or 4 PowerPoint slides for each question | ❑ Upload to Video Sharing Sites via TubeMogul |
| ❑ Screen capture software (Camtasia / Jing) | ❑ Title videos: Funeral Questions [City] | [Question] |
| ❑ TubeMogul.com account for Video Sharing | ❑ Place URL at the beginning of each description |
| ❑ Purchase URL [City]FuneralFacts.com | ❑ Repurpose written FAQs as articles / blog posts |

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| 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… | | | Promoting Your Video… |
| Use [Traffic Geyser (preferred)](http://www.TrafficGeyser.com/cmd.php?Clk=2470343) or [TubeMogul](http://www.tubemogul.com) | | | ❑ 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 |
| **Video Sites** | | **Social Bookmark** |
| [YouTube](http://www.youtube.com/signup)  [DailyMotion](http://www.dailymotion.com/register)  [Yahoo](https://login.yahoo.com/config/login_verify2)  [MySpace](http://signup.myspace.com/index.cfm?fuseaction=Join)  [Metacafe](http://www.metacafe.com/)  [Revver](http://revver.com/account/register/) | [Blip.TV](http://blip.tv/users/create/)  [Veoh](http://www.veoh.com/register) [Viddler](http://www.viddler.com/signup/)  [Vimeo](http://www.vimeo.com/sign_up)  [HowCast](https://www.howcast.com/sign_up)  [5min](http://www.5min.com/) | [Del.icio.us](http://delicious.com/)  [Digg](http://www.digg.com/)  [Diigo](http://www.diigo.com/)  [Google Bookmarks](http://google.com/bookmarks)  [Kaboodle](http://www.kaboodle.com/)  [StumbleUpon](http://www.stumbleupon.com/) |

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| 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… | | | Promoting Your Video… |
| Use [Traffic Geyser (preferred)](http://www.TrafficGeyser.com/cmd.php?Clk=2470343) or [TubeMogul](http://www.tubemogul.com) | | | ❑ 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 |
| **Video Sites** | | **Social Bookmark** |
| [YouTube](http://www.youtube.com/signup)  [DailyMotion](http://www.dailymotion.com/register)  [Yahoo](https://login.yahoo.com/config/login_verify2)  [MySpace](http://signup.myspace.com/index.cfm?fuseaction=Join)  [Metacafe](http://www.metacafe.com/)  [Revver](http://revver.com/account/register/) | [Blip.TV](http://blip.tv/users/create/)  [Veoh](http://www.veoh.com/register) [Viddler](http://www.viddler.com/signup/)  [Vimeo](http://www.vimeo.com/sign_up)  [HowCast](https://www.howcast.com/sign_up)  [5min](http://www.5min.com/) | [Del.icio.us](http://delicious.com/)  [Digg](http://www.digg.com/)  [Diigo](http://www.diigo.com/)  [Google Bookmarks](http://google.com/bookmarks)  [Kaboodle](http://www.kaboodle.com/)  [StumbleUpon](http://www.stumbleupon.com/) |

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| Funeral Home Radio – Interview Schedule |
| **The Invite**: Hi, \_\_\_\_\_\_\_\_\_\_\_, it’s \_\_\_\_\_\_\_\_ from the funeral home. I’m not sure if you are interested, but I was wondering if you would like to be a guest on our online radio show – \_\_\_\_\_\_\_\_\_\_\_\_\_\_. On the program, we talk about “end of life” issues, and I thought that it would be very beneficial for our listeners to hear your thoughts / perspective / advice about \_\_\_\_\_\_\_\_\_\_\_. I will make sure that we make the recording available to your \_\_\_\_\_\_\_\_\_\_\_. How about I take you out to lunch on \_\_\_\_\_\_\_\_ and then we can record the interview after. It’s only about 20 minutes, but we have found that the information is very helpful to the members of our community. |
| **Rabbi** on what non-Jewish people should know about attending a Jewish funeral service |
| **Hospice Counsellor** on talking about what families need to know to prepare themselves |
| **Funeral Industry Technology Expert** (staff member) explaining the about Memorial Video Tributes |
| **Catholic Priest** on acceptable cremation practices |
| **Estate Lawyer** talking about wills, trusts, and probate |
| **Cremation Expert** (staff member) about the various options about cremation |
| **Funeral Celebrant** on options for non-religious funeral services |
| **Nursing Home Manager** on the transitioning parents from their home to a nursing home |
| **After Care Consultant** (staff member) talking about the various steps needed to be prepared to settle an estate |
| **Bereavement Counsellor** talking about helping children with grief |
| **Protestant Pastor** talking about the meaning of “Blue Christmas” |
| **Event Planning Expert** (most creative staff member) talking about different ways of honoring someone’s life |

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| Funeral Home Radio – Interview Schedule |
| **The Invite**: Hi, \_\_\_\_\_\_\_\_\_\_\_, it’s \_\_\_\_\_\_\_\_ from the funeral home / cemetery. I’m not sure if you are interested, but I was wondering if you would like to be a guest on our online radio show – \_\_\_\_\_\_\_\_\_\_\_\_\_\_. On the program, we talk about “end of life” issues, and I thought that it would be very beneficial for our listeners to hear your thoughts / perspective / advice about \_\_\_\_\_\_\_\_\_\_\_. I will make sure that we make the recording available to your \_\_\_\_\_\_\_\_\_\_\_. How about I take you out to lunch on \_\_\_\_\_\_\_\_ and then we can record the interview after. It’s only about 20 minutes, but we have found that the information is very helpful to the members of our community. |
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| Funeral Home Radio - Interview Format | | |
| Show Intro: |  | |
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| Topic: |  | |
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| Today’s Guest(s): |  | |
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| Guest’s Background: |  | |
|  | |
| Guest’s experience with topic: |  | |
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| Why is this topic important: |  | |
|  | |
| Background of topic: |  | |
|  | |
| Sharing stories / examples: |  | |
|  | |
| Tips on dealing with these issues: |  | |
|  | |
| Additional resources (if applicable): |  | |
|  | |
| Thanks to today’s guest(s): |  | |
|  | |
| Closing: |  | |
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| What You Need… | | What To Do… |
| ❑ Computer with Mic | | ❑ Record, edit, & export to MP3 format |
| ❑ Audio Recording Software: Audacity / GarageBand | | ❑ Upload to Blog / Podcast Directory |
| ❑ iTunes Badge (600 px X 600 px) | | ❑ Transcribe recording & add to blog |
| ❑ Blog, Podcast Directory, iTunes Account | | ❑ Notify guest, provide them with link (anchor text) |

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| Google Listings Worksheet | | | | | |
| Legal Business Name: | | | | | |
| Physical Location Address: | | | | | |
| Telephone: | | Email: | | Web: | |
| Description (Use keywords):  200 characters max. | | | | | |
| Choose 5 of the following categories | | | | | |
| ❑ Funeral Homes  ❑ Cemeteries  ❑ Cremation | | | ❑ Caterers  ❑ Monument Dealers  ❑ Event Planners | | |
| Upload 10 Photos & 5 Videos (can link to web photos from web) | | | | | |
| ❑ 1. Photo \_\_\_\_\_\_\_\_\_\_\_\_\_\_  ❑ 2. Photo \_\_\_\_\_\_\_\_\_\_\_\_\_\_  ❑ 3. Photo \_\_\_\_\_\_\_\_\_\_\_\_\_\_  ❑ 4. Photo \_\_\_\_\_\_\_\_\_\_\_\_\_\_  ❑ 5. Photo \_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | ❑ 6. Photo \_\_\_\_\_\_\_\_\_\_\_\_\_\_  ❑ 7. Photo \_\_\_\_\_\_\_\_\_\_\_\_\_\_  ❑ 8. Photo \_\_\_\_\_\_\_\_\_\_\_\_\_\_  ❑ 9. Photo \_\_\_\_\_\_\_\_\_\_\_\_\_\_  ❑ 10. Photo \_\_\_\_\_\_\_\_\_\_\_\_\_ | | ❑ 1. Video \_\_\_\_\_\_\_\_\_\_\_\_\_\_  ❑ 2. Video \_\_\_\_\_\_\_\_\_\_\_\_\_\_  ❑ 3. Video \_\_\_\_\_\_\_\_\_\_\_\_\_\_  ❑ 4. Video \_\_\_\_\_\_\_\_\_\_\_\_\_\_  ❑ 5. Video \_\_\_\_\_\_\_\_\_\_\_\_\_\_ | |
| Memberships:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | | Brands Carried:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | |
| Coupon Suggestions: | | |  | | |
| ❑ 5 Free Funeral Director Statements of Death  ❑ $100 off Paid Preneed Contact  ❑ $100 Monument | | | ❑ 10% Flowers  ❑ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  ❑ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | |
| Reviews: | | | | | |
| Citation Websites: | | | Brainstorm Potential Reviewers: | | |
| ❑ maps.google.com / .ca  ❑ [yelp.com](http://maps.google.com/local_url?q=http://www.yelp.com/biz/krtil-john-funeral-home-yorkville-funeral-svce-inc-new-york&dq=Funeral+Homes&cid=4526919364060046895&hl=en&ved=0CIkBEOcJSAE&ei=2JPfTKPeDZn2iwPliYjUCA&vps=85&output=js&jsv=293b&sa=X&provider=WEB:yelp.com&geocode=Fe4LbgIdIYCX-w&s=ANYYN7nNia7lhowyjsVwhKrCDDxPWogYvA) / .ca  ❑ citysearch.com  ❑ insiderpages.com | ❑ yahoo.com / .ca  ❑ yellowpages.com / .ca  ❑ foursquare.com  ❑ canadiankiosk.ca | | ❑ \_\_\_\_\_\_\_\_\_\_\_\_\_\_  ❑ \_\_\_\_\_\_\_\_\_\_\_\_\_\_  ❑ \_\_\_\_\_\_\_\_\_\_\_\_\_\_  ❑ \_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | ❑ \_\_\_\_\_\_\_\_\_\_\_\_\_\_  ❑ \_\_\_\_\_\_\_\_\_\_\_\_\_\_  ❑ \_\_\_\_\_\_\_\_\_\_\_\_\_\_  ❑ \_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

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| Name: | Email: | | Call Won: Yes / No |
| Date & Time Received: | | Date & Time Sent: | |
| Relationship to Deceased: | | Other Family Mentioned: | |
| Time Frame: At-Need / Near-Need / Pre-Need | | Shopper Type: Price Seeker / Info Gatherer | |
| Service Type / Disp: Cremation / Burial / Funeral / Memorial / Celebration / Graveside | | | |
| Identify specific questions that need to be answered: | | | |
|  | | | |
|  | | | |
| Spot specific points that can be elaborated on / connected to: church, connections, etc.: | | | |
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|  | | | |
| Before You Press Send... | | | |
| * Tone: one to one, personal, not corporate * Mirrored writing style: same or one up * Provided empathy if possible / appropriate * Gave them what they want “Above the Fold” - answered main question early * Included Power Statement (even below PS) * Provided additional education * Gave something away for FREE * Links going to specific pages (deep links) * No links to home page * Call to Action #1: Email back * Call to Action #2: Requested call, meeting | | * PS ("Besides price" Question) * Included cell phone # in copy * Included nice (trusting) photo * No sales pitch * Small paragraphs & use line breaks * Plain text or basic HTML formatting * No or limited number of graphics * Attachments are PDFs * Attachment filenames make sense * Replied All if approp. (but no competitors) * Replied to email within 45 minutes * Sent Follow Up before the end of the day | |

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| Successful Search Scenario: Maintain Congruency of the Search | | |
| Google AdWords Campaign Structure | | |
| 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! | | |

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| Decision Makers in Your Most Profitable Niches / Markets | |
| Name of Niche:  Description:  Fears, Frustrations, Pain, Urgency:  Past experiences / Interests:  Personify: | Name of Niche:  Description:  Fears, Frustrations, Pain, Urgency:  Past experiences / Interests:  Personify: |
| Name of Niche:  Description:  Fears, Frustrations, Pain, Urgency:  Past experiences / Interests:  Personify: | Name of Niche:  Description:  Fears, Frustrations, Pain, Urgency:  Past experiences / Interests:  Personify: |
| Name of Niche:  Description:  Fears, Frustrations, Pain, Urgency:  Past experiences / Interests:  Personify: | Name of Niche:  Description:  Fears, Frustrations, Pain, Urgency:  Past experiences / Interests:  Personify: |

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|  | Competitors Matrix | | | | | | | |
|  | Are you the leader? Can it be fixed? Is there a benefit to fixing it? | | | | | | | |
|  |  | Leader | Fix? | Benefit | Your FH | 2 | 3 | 4 |
| Professional Services | |  |  |  |  |  |  |  |
|  | Funeral directing |  |  |  |  |  |  |  |
|  | Embalming quality |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
| Facilities | |  |  |  |  |  |  |  |
|  | Foyer / Reception |  |  |  |  |  |  |  |
|  | Arrangement Offices |  |  |  |  |  |  |  |
|  | Visitation Lounges |  |  |  |  |  |  |  |
|  | Product display |  |  |  |  |  |  |  |
|  | Chapels - Décor |  |  |  |  |  |  |  |
|  | Chapels - Cap. / Func. |  |  |  |  |  |  |  |
|  | Parking Lot |  |  |  |  |  |  |  |
|  | Reception Centre |  |  |  |  |  |  |  |
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| Vehicles | |  |  |  |  |  |  |  |
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| Additional Services | |  |  |  |  |  |  |  |
|  | After Care |  |  |  |  |  |  |  |
|  | Video Tribute |  |  |  |  |  |  |  |
|  | Catering |  |  |  |  |  |  |  |
|  | Customized Stationary |  |  |  |  |  |  |  |
|  | Website |  |  |  |  |  |  |  |
|  | Funeral participants |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
| Staff | |  |  |  |  |  |  |  |
|  | Full time |  |  |  |  |  |  |  |
|  | Part time |  |  |  |  |  |  |  |
|  | Receptionists |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
| Other | |  |  |  |  |  |  |  |
|  | Phone Etiquette |  |  |  |  |  |  |  |
|  | Going Extra Mile |  |  |  |  |  |  |  |
|  | Pre-arrangement staff |  |  |  |  |  |  |  |
|  | Prefunding Product |  |  |  |  |  |  |  |
|  | Community involvement |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
| Affiliated Cemetery | |  |  |  |  |  |  |  |
|  | Perceived value |  |  |  |  |  |  |  |
|  | Grounds appearance |  |  |  |  |  |  |  |
|  | C.R. handling / return |  |  |  |  |  |  |  |
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| Niche Markets | |  |  |  |  |  |  |  |
|  | Asian |  |  |  |  |  |  |  |
|  | European (Gr. Cr. Port.) |  |  |  |  |  |  |  |
|  | Native |  |  |  |  |  |  |  |
|  | Catholic |  |  |  |  |  |  |  |
|  | Protestant |  |  |  |  |  |  |  |
|  | Jewish |  |  |  |  |  |  |  |
|  | L.D.S. |  |  |  |  |  |  |  |

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| Core Competency Brainstorming Worksheet | |
| What are the 3 key things about your firm that differentiates you from your competitor(s)?  (Besides Family-owned, Multi-generational, 100+ years)  1.  2.  3. | |
| What are 3 services that you offer that are better than what your competitor offers?  (Must be valuable to Client Families)  1.  2.  3. | |
| What are the 3 most profitable niches / groups and the 3 largest groups of people in your market?  (Examples: Specific denominations, ethnic groups, certain age groups / demographics) | |
| Most Profitable  1.  2.  3. | Largest  1.  2.  3. |
| In the Thank You cards / letters that you have received from client families over the past 3 years, what did they specifically mention that was most helpful / beneficial for them?  (Be as specific as possible: “touching video tribute” is better than “personal service” OR “after care appointment was very beneficial” is better than “attention to details” - use the balance of this sheet jot down the 2-10 word phrases that you have received from client families – Use Their Words, not yours) | |

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| Client Family Benefit Statements |
| Formula:  [Your Feature / Your Differentiating Factor] + “and what this means to you is” + [client family benefit] |
| Examples:  “We have an onsite reception and catering facility and what this means to you is that it makes it easy for all of the attendees to meet with you after the service and that you do not have to worry about hosting a large group of people at your home.”  “We offer Celebration of Life video tributes, and what this does is makes the service more meaningful by capturing your Dad’s life in pictures for all of the attendees to see and also gives you a memorable keepsake that you can watch whenever you want.” |
| Your Feature / Differentiating Factor: |
| ...and what this means to you is... |
| Client Family Benefit: |
| 2nd Client Family Benefit (optional): |
| Your Feature / Differentiating Factor: |
| ...and what this means to you is... |
| Client Family Benefit: |
| 2nd Client Family Benefit (optional): |
| Your Feature / Differentiating Factor: |
| ...and what this means to you is... |
| Client Family Benefit: |
| 2nd Client Family Benefit (optional): |

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| Price Comparison Worksheet | | | | | |
| **Service Offerings for Simple Cremation** | **Lowest**  **Cost** | **Best**  **Value** | **Comp 1** | **Comp 2** | **Comp 3** |
| Registering Death with Vital Stats |  |  |  |  |  |
| Transfer of Deceased |  |  |  |  |  |
| Cremation Container |  |  |  |  |  |
| Dressing of Deceased |  |  |  |  |  |
| Option of making arrangements at your home |  |  |  |  |  |
| Option of making arrangements at the funeral home |  |  |  |  |  |
| Basic Preparation & Personal Care of Deceased |  |  |  |  |  |
| Viewing of Deceased |  |  |  |  |  |
| Cremation Fee |  |  |  |  |  |
| Scheduled Witness Cremation |  |  |  |  |  |
| Basic Urn |  |  |  |  |  |
| Delivery of Cremated Remains |  |  |  |  |  |
| After-Care Concierge |  |  |  |  |  |
| Completion & Mailing of all Government Forms |  |  |  |  |  |
| Certificate of Death |  |  |  |  |  |
| Statements of Death |  |  |  |  |  |
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| Price Comparison Worksheet | | | | | |
| **Service Offerings for** | **Lowest**  **Cost** | **Best**  **Value** | **Comp 1** | **Comp 2** | **Comp 3** |
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| Carlton 4 Step Letter / Script |
| Here's Who I Am . . . |
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| Here's What I Got . . . |
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|  |
| Here's What It Will Do For You . . . |
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| Here's What I Want to Do Next / Right Now . . . |
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| 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 | |
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