



OVERCOME PRENEED'S BIGGEST PITFALL

THE GAP BETWEEN GENERATING LEADS AND
PREARRANGING FUNERALS HAS NEVER BEEN GREATER,
WHICH IS WHY PRECOA ENGINEERED A SOLUTION.

In 2004, Precoa opened its first Funeral Planning Center (FPC) because it saw how challenging it was for funeral homes to follow-up with families. By calling leads and setting high-quality appointments, the FPC could support advance funeral planners and help funeral homes grow.

Yet it runs even deeper than that. The conversations that begin in the FPC extend in so many unexpected ways, enriching the lives of everyone they connect. Read on to find out how.



Matt West
Associate Director
of FPC



Jesy Guerrero
FPC West Region
Manager



Andrew Maiden
FPC Training
Manager

A CLOSER LOOK AT THE FPC

At first glance, training at the FPC might seem conventional. But look closer. The latest cohort of planners rehearsing calls and offering kind, constructive criticism have built an enviable degree of trust.

As you can probably already guess, this compassionate bond is no accident.

"When we recruit, we're looking for individuals who can truly connect with people," FPC training manager Andrew Maiden says. "No family sets an appointment unless they trust the person they're talking to."

By the end of their second week, planners have internalized the FPC's script, making it their own so they can focus on listening carefully and having quality conversations with families.

And quality is what counts. "Even without an appointment, we want the families we call to have the best possible experience," FPC associate director Matt West says. "As representatives of the funeral home, we need to make sure we maintain their reputation for excellence."

Unlike a run-of-the-mill call center, the FPC's emphasis on quality means planners are encouraged to develop relationships with families.

"I've called families in July who might not set an appointment until December," FPC region manager Jesy Guerrero says. "Taking the time to *really* get to know a family and hearing their stories—it gets to the point where I just say hello and they already know who it is."

Such careful nurturing requires persistence, patience, and most of all a talent for connection. In the case of the FPC, it also required unique software, which Precoa developed in-house. Known as the planner app, this software helps planners call the right leads at the right times and allows them to quickly navigate the complex schedules of advance funeral planners who may be serving multiple funeral home locations.

Still, funeral home owners are often curious to see this at work for themselves. On average, more than fifty owners come through the planning center each year.

Matt West has led many of these visits. "When funeral home owners arrive, we can sometimes feel their skepticism," he says. "Yet afterwards, the feedback is always positive. They say, 'These folks understand what we're trying to accomplish.' Owners quickly realize our planners are who they want calling on behalf of their funeral home."

Athens, GA



Tom Lord
Owner and Founder



Ray Finger
Advance Planning
Specialist

CASE STUDY #1

LORD AND STEPHENS FUNERAL HOMES

BUILDING MEANINGFUL CONNECTIONS FOR EVERYONE

Nestled in the close-knit community of Athens, GA, Lord and Stephens Funeral Homes was founded because owner Tom Lord believed an independent, locally owned funeral home could provide families with the highest quality service.

"Tom is the kind of guy who is always there, setting the example for how to serve and care for families," Advance Planning Specialist Ray Finger says. "He believes we can serve families from the very first time we meet them, years before they even have a service."

Preneed was instrumental in helping Lord and Stephens build these relationships with the families surrounding their three locations. As a former minister, Ray thrived when he could sit down with folks and learn their stories before helping them make wise decisions.

But following up with leads took time. "I was never able to gain momentum or reach the full potential of the position because I was spending so much time on the phone," Ray admits.

When Tom first learned about Precoa, both he and Ray shared concerns about partnering with a larger company. Yet their expectations

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quickly changed. "Trust me when I say I did my research," Tom says, "and I was impressed by what I read, and even more impressed when I

talked to other firms. I got absolutely zero negative comments."

Especially key was the follow-up support through Precoa's Funeral Planning Center, which established a meaningful rapport with families, setting them at ease about a subject many find challenging.

"Now I don't see how we could do without it," Tom says. "The support they provide behind the scenes is amazing. We could not hire anyone on our staff to do what the FPC does. It's just an extension of our firm, and that's what we want."

The FPC also connects Lord and Stephens to an array of additional support, including the most efficient lead generation sources. "Precoa has given me every tool necessary to serve families," Ray says.

And this has led to extraordinary growth. "Precoa takes a lot off of our shoulders," Tom says. "We've grown so much in the last three years, and I know that what they're doing, they're doing right."

FPC STATS
80,000
APPOINTMENTS SET
- 2019 -

Portland, OR



66 Planners

Est. 2004

Anaheim, CA



12 Planners

Mar. 2015

Provo, UT



25 Planners

Jan. 2017

CASE STUDY #2

LUCAS FUNERAL HOMES



Jimmy Lucas
 Director and Owner

CREATING NEW OPPORTUNITIES THROUGH EFFICIENCY

With fourteen locations and a legacy stretching back 160 years, Lucas Funeral Homes has mastered the art of caring for families. In large part this is due to their staff. Each of the more than 90 full- and part-timers receives extensive training—in fact, owner Jimmy Lucas will soon start Lucas Academy, where each of his co-workers will learn a consistent standard of care.

Yet preneed presented a challenge. “We were struggling to take it to that next level,” Jimmy says. They expected their program could reach more families, but the investment in lead generation, not to mention the follow-ups, was daunting.

So when Jimmy met with Precoa, his interest was piqued. The proposed

increase in preneed volume impressed him, but he was also struck by their values. As he often says about recruiting new staff, you can teach people anything except empathy and compassion.

Once the partnership with Precoa got going, the Funeral Planning Center’s support became vital. They were soon reaching more families through preneed than ever before, and every lead source was more efficient. “Theirs wasn’t a four-cylinder approach,” Jimmy says. “It was the full V8.”

Preneed volume doubled, but Jimmy saw more meaningful benefits as well. For one, advance funeral planners now had complete control over their schedules. No longer did they have to find the extra time to conduct every follow-up. Work-life

balance improved, resulting in a better quality of life, and they could now focus on doing what they loved best—meeting with families who want to preplan.

When it comes down to it, Jimmy says Precoa feels like another piece of the family business.

“I’m looking forward to serving as many families as we can together,” he says. “We want to keep moving forward, and Precoa has the wherewithal to walk alongside us. They have the ability to go bigger—not just anybody can do that.”

Learn more about what the FPC can do for you. Visit precoa.com or call **773-263-5187** to schedule a consultation.