



+44 28 2582 1005  
[www.plotbox.io](http://www.plotbox.io)

# Gaining & Retaining Families by using a CRM

Laura O'Neill, CRM Administrator

Cemetery  
Management  
Reimagined.

# Agenda

- 1 CRM Explained
- 2 The first steps towards effective marketing & sales activity
- 3 The case for a specific crematorium & cemetery CRM tool versus a generic tool
- 4 Where to start and practical first steps

---

# What is a CRM?

Customer Relationship Management (CRM) is the technologies and strategies a company use to manage and analyze their interactions with individual and potential customers.

## *A CRM Tool assists with:*

- Managing contacts & relationships
- Tracking engagement with families
- Sharing information with colleagues
- Planning campaigns
- Sales
- Productivity



# First steps towards effective marketing & sales activity

Cemetery  
Management  
Reimagined.

---

# First steps to effective marketing & sales

## Step 1: Start recording interactions digitally

*Little black book, lead cards & post it notes:*

- Are outdated and disorganised
- Lack visibility and collaboration
- Don't have any metrics



---

# First steps to effective marketing & sales

## Step 2: Think about who you want to target

*Build target lists from your current data:*

- Deed owners
- Memorial lease owners
- Families
- Religious backgrounds
- Community groups
- Funeral Directors



---

# First steps to effective marketing & sales

## Step 3: Create a shared calendar for planning campaigns

- Holiday campaigns
- Cemetery events
- Monthly or Quarterly Newsletter
- Condolence letters/ emails
- Expiring Quotations



# The case for a specific crematorium & cemetery CRM tool versus a generic tool

Cemetery  
Management  
Reimagined.



---

# Why do cemeteries & crematoria need a CRM?

- To Increase Sales
- Accurate Sales Forecasting
- Visibility! Don't lose prospects
- Improve Relationships



---

## Available CRMs

HubSpot

Marketo

insightly

Microsoft  
Dynamics CRM

PLOTBOX

pipedrive

ORACLE

salesforce

ZOHO  
CRM

---

# Best CRM Features for cemeteries & crematoria



**#1 Streamlined Data Management:** CRM systems provide a searchable database to store contact information.



**#2 Sales Forecasting:** Easily visualise your entire sales pipeline and move prospects from one stage to another.



**#3 Meaningful Reports:** Produce reports you need in real-time including your sales team activity and revenue growth by using a CRM.



**#4 Monitor Sales Team Activity:** Using a CRM can help standardise your sales team processes. Tasks can be scheduled in a calendar, updated and completed. Progress of each task can be easily tracked.

---

# Best CRM Features for cemeteries & crematoria



**#5 Integrations:** your chosen CRM should integrate with software you're already using in order to complete your daily tasks.



**#6 Leaderboards:** Create some friendly competition in your cemetery by displaying individual's activity levels and forecasted sales in a CRM.



**#7 Mobile CRM:** With a mobile CRM you'll have the ability to access information from anywhere at anytime on any device.

# Where to start & practical first steps

Cemetery  
Management  
Reimagined.

---

# Recording Interactions

*Create a template for capturing lead information:*

	A	B	C	D	E	F	G	H
1	First Name	Last Name	Email	Phone	Address	Lead Source	Notes	Opt in?
2	Laura	O'Neill	laura.oneil	1234567891	ABC Street	APSE 2020	Laura would like a quotation for leasing a memorial via email. Set task to send this to Laura on Wednesday.	Yes - Laura verbally consented to receiving sales and marketing emails.
3								

# Import to CRM system when ready

The screenshot displays the 'Contact Data Import' workflow in the PLOTBOX application. The interface is divided into three main stages, indicated by a progress bar at the top:

- 1 Upload Data**: The first stage, currently inactive.
- 2 Verify Columns Mapping**: The active stage, showing a comparison between source columns and mapped headers.
- 3 Preview and Confirm Data**: The final stage, currently inactive.

**Columns** (Source Data):

Title
Forename
MiddleName
Surname
AddressLine1
AddressLine2
Town

**Mapped Headers** (Target Fields):

Title
First Name
Middle Name
Last Name
AddressLine1
AddressLine2
Town

**Map Headers** (Filtering Options):

- Input field: Enter column name to add (+)
- Input field: Enter text to Filter
- Selected header: Address
- Selected header: Opt in?

The interface includes a 'Back' button in the top right corner and a navigation menu on the left side with options like Diary, Records, Contracts, Deeds, Memorials, Plots, Finance, Reporting, CRM, Work, Documents, Settings, Plotbox A..., and Logout.

# Import to CRM system when ready

The screenshot displays the PLOTBOX CRM dashboard. On the left is a dark blue sidebar with navigation options: Dashboard, Diary, Records, Contracts, Contacts, Deeds, Memorials, Plots, Finance, Reporting, CRM (highlighted), Work, Documents, Settings, and a user profile for Laura O'... The main content area is titled 'Dashboard' and includes sub-navigation for All Contacts, Activities, Notifications, Quotations, and Reports. The 'Recent Activities' section lists six entries, each with a 'plotbox' icon and a description of an activity, including dates and names like John Mahoney, Mary Reynolds, Ryan Reynolds, and Mary Test. The 'Productivity' section on the right shows 'Your stats' with a line graph icon and the text 'Where you've been most productive'. Below this are six horizontal bars representing different metrics: Emails (2), Calls (7), Meetings (2), New Contacts (8), Contracts Sold (11), and Revenue (92016.38). A blue notification bell icon is located at the bottom right of the dashboard area.





+44 28 2582 1005  
[www.plotbox.io](http://www.plotbox.io)

**Thank you**  
**Q&A**

[laura.oneill@plotbox.io](mailto:laura.oneill@plotbox.io)

**Cemetery**  
**Management**  
**Reimagined.**