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## Gaining & Retaining Families by using a CRM

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Gaining & Retaining Families by using a CRM

### Agenda

- CRM Explained
- The first steps towards effective marketing & sales activity
- The case for a specific crematorium & cemetery CRM tool versus a generic tool
  - 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

### 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- Are outdated and disorganised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

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- Religious backgrounds
- Community groups
- Funeral Directors





• Step 3: Make a calendar of important dates for campaigns

### 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

### Why do cemeteries & crematoria need a CRM?

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





# Available CRMs HubSpot *Marketo*°



Microsoft\* Dynamics\* CRM

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pipedrive







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### **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

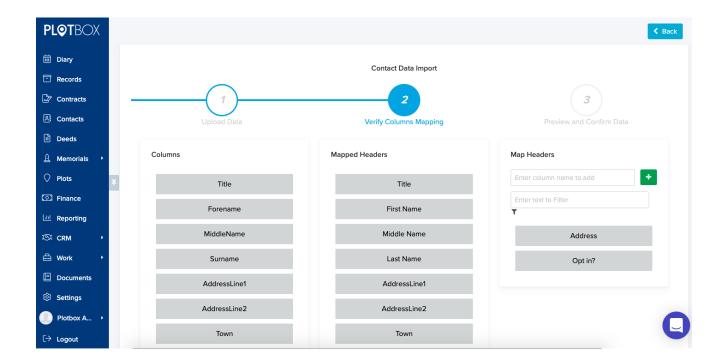
### **Recording Interactions**

### Create a template for capturing lead information:

	A	В	с	D	E	F	G	н
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								

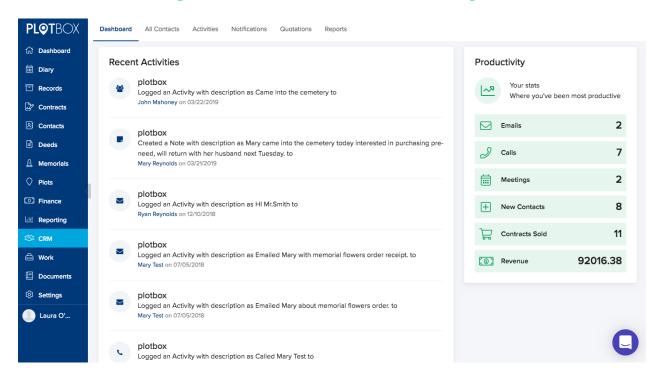


### Import to CRM system when ready





### Import to CRM system when ready









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## Thank you Q&A

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