

Strategies for a Profitable Pre-Need Program



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Strategies for a Profitable Pre-Need Program

What You Need:

1. Committed Owner
2. Educated, Trained Seller
3. Strict Procedures
4. Strong Funding Provider
5. Continuous Marketing
6. Constant Monitoring
7. Open Assessment

Strategies for a Profitable Pre-Need Program

1. Committed Owner

- Acknowledge the Need
- Open to Advice
- Commits Resources



2. Educated, Trained Seller

- Good Communicator
- Knowledge of Funeral Service
- Trained to Sell
- Motivated to Secure Consumer Commitment
- Sources



3. Strict Procedures

- Mandated by Statute / Regulation
- Promoted by Associations
- Required by Funding Provider
- Established within Business Plan



4. Strong Funding Provider

- Financial Strength
- Ratings Matter
- Growth Rates
- Commissions
- Customer Service



5. Continuous Marketing

- Public Education
- Lead Generation
- Support of At-Need Staff



6. Constant Monitoring

- \$\$ Spent to Leads Acquired to Appointments to Sales
- Internally-generated Leads to Appointments to Sales
- \$\$ Spent to Funeral Volume of Sales
- Pre-Need Volume to At-Need Volume

7. Open Assessment

- Employee Involvement
- Seller's Results
- Consumer Feedback
- Lead Generation
- Funding Returns
- Peer Comparisons



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