

THE SYSTEM UNIVERSITY

Offered Exclusively by ICCFA

What You'll Learn

- A Comprehensive 20 Day Training Schedule that Includes a Mix of Online Sessions featuring Interactive Classes, Free Videos, and our Exclusive System Online Library
- Setting and Tracking Goals
- Prospecting Scripts
- How to Present the Personal Planning Organizer
- How to Obtain Referrals
- Closing Techniques
- The Importance of Tracking Leads
- And Much More

A system is: a set of proven and defined methods, processes, and measures which achieve the desired result when implemented properly.

**INITIAL TRAINING SCHEDULE—ONLINE VERSION
VITAL SKILLS FOR SALES SUCCESS IN 20 DAYS**



INITIAL TRAINING SCHEDULE - Online Version VITAL SKILLS FOR SALES SUCCESS IN 20 DAYS

A system is: a set of proven and defined methods, processes, and measures which achieve the desired result when implemented properly.

Welcome to The System University's **Initial Training Schedule**. Our experience has shown that training is most effective when you only teach what is most useable each day. For example, for the first few days a new you need to know how to prospect but do not need to know how a casket is made or a mausoleum is built.

Each training support item has a hyperlink to www.thesystemuniversity.com website. This training outline is geared for our System Members. Some links are to free downloads. Some show different products, scripts, and training material that are available for purchase. However, if you are not a System subscriber some of the training elements will not be accessible.

The First 20 Days. In your initial 20 days of training, you will only be exposed to the most critical elements you need to learn to succeed in the profession. Our philosophy is: "We train people initially and develop them perpetually." Therefore, initially we are only going to train you on the essential survival skills to ensure you know how to prospect, set appointments, make an effective presentation, and close sales. However, this is just the beginning of your learning journey.

Continuous Learning. The System University had an enormous amount of content, to which we are adding constantly. From instructional videos to our popular System Shorts (2 plus minute videos from specific topics to personal motivation). As part of your development process, you will be exposed to interactive learning modules and the massive in-depth supporting insights found in The System's Online Pre-Need library. The content found in The System University has almost everything you will need to know to be successful as a professional pre-need sales counselor in this profession.

Perpetual Reinforcement. It's so easy to drift from the foundation of an effective selling process. This means it's easy to stop doing one thing, then another, and before you know it, you are so far off from the selling process you initially learned, your sales start to decline. To avoid this subtle drift requires continual reinforcement. This is why you will need to go back to The System University and review all of the many training and development tools. This process is critical to your continued success and helps ensure you avoid the drift.



The Value of Daily Accountability. One of the master keys to your success will be the daily accountability process. We urge you not to look at the information your manager will ask you for on a daily basis as some form of *micro-managing* because it is not. It is, however, a form of *micro-monitoring* your daily activities and outcomes.

Measuring volume is not effective. Why? It is a lagging indicator of what you did and it can't be changed. Whereas, paying attention to your daily efforts and results are telling. Your efforts and results tell you what you are doing. Therefore, if what you are doing is not getting you to where you want to go, your efforts can be redirected—giving you the time for effective course correction. We define this process as: *"A method of daily measurement of your activities and outcomes, to help ensure you reach your weekly sales objectives."*

You can be confident in knowing that the methods you will learn, the metrics that will be used to ensure you stay on track, and the materials we have developed have been effective in markets large and small. They have been tested, revised, vetted, and proven to work when done properly.

Please know when complete this initial training, it is not the end of your training. In fact, it is only the beginning. We believe that you learn the fundamentals initially and that you develop yourself perpetually. We encourage you to follow The System, because The System will lead you to Success! Our Best for Your Service Selling Sales Success,

David Shipper & Gary O'Sullivan, CCFE
Co-Creators of The System University

IMPORTANT INFORMATION—Online Courses: To access any of the online courses referenced in this print version of the Training Schedule, go to <https://courses.thesystemuniversity.com>. Enter your username and your password. Look for the video on your dashboard and click to view.

Online Libraries: To access any of the online libraries referenced in this print version of the Training Schedule, go to www.thesystemuniversity.com and select Counselor Library. Click on the book cover. Use the password you were given when you were enrolled to access.

Free Videos: To access any of the free videos referenced in this print version of the Training Schedule, go to www.thesystemuniversity.com and look for Free Videos link at the top of your screen.

Materials & Scripts: To order any of the materials referenced in this Schedule, go to www.thesystemuniversity.com and click on Pre-Need Superstore.

NOTE: An online version of the Training Schedule is available in the Pre-Need Superstore at www.thesystemuniversity.com. Select "Free Training Schedule – Online Version," and add it to your shopping cart. Follow the instructions to check out. You will then be able to download the document to your computer where you can simply click on the links to go to an online course, online book, free video or product referenced in the Training Schedule.



WEEK ONE - Learning Your Most Value Skill: Prospecting

If you don't have people to see, then nothing else matters.

Prospecting is the key to success. If you won't or can't prospect, you will not have people to whom you can present our products and services. In this first week of training, you will learn The System's comprehensive prospecting program. By the end of this week, you will have learned: several prospecting methods and scripts; how to manage two or three of the most common objections to setting appointments; how to set appointments and keep track of the appointments you set, and how to calculate exactly how much money you can make from each hour of prospecting. If you will simply follow The System, The System will lead you to success.

DAY 1

__ Introduction to the Company

__ **TSU Free Video:** "So You Are New to The Business" (System Short: 14 Minutes)
https://www.youtube.com/watch?time_continue=2&v=wuXOA7LrkK4

__ **TSU Classroom Video:** "Personal Planning Organizer – Part One"
<https://courses.thesystemuniversity.com>.

__ **TSU Classroom Video:** "Personal Planning Organizer – Part Two"
<https://courses.thesystemuniversity.com>

__ **Script:** Introduction to the Personal Planning Organizer Prospecting Script(s) and Common Objections
https://thesystemuniversity.com/pre-need_superstore/Script-Personal-Planning-Organizer-p47687254

__ **TSU Free Video:** "Accept the Grind" (System Short: 3 minutes)
<https://www.youtube.com/watch?v=1dB2AghLSdI>

__ **Live Prospecting:** Using a scrubbed homeowner's list, use the Personal Planning Organizer script

__ **LeadTrak:** Enter Lead, prospects and/or appointments into LeadTrak

__ **Assignment:** Take a copy of the Personal Planning Organizer and complete it with your personal information. This will help give you a deeper understanding of the challenging questions families must answer and it will give you great insight as to how this will benefit families. Find the PPO here:
https://thesystemuniversity.com/pre-need_superstore/Personal-Planning-Organizer-c26348195

__ **Q & A:** Ask any questions for clarification or a better understanding of the concepts and materials covered today, if needed.

Notes: _____

Initials Signifying Completion: Date _____ Trainee _____ Sales Manager _____



DAY 2

__ **TSU Classroom Video:** “The Power of the Goal Planner” <https://courses.thesystemuniversity.com>

__ **Update** your Personal Goal Planner from Day One. Find the Goal Planner here:
https://thesystemuniversity.com/pre-need_superstore/Personal-Goal-Planner-p36762500

__ **Show Me the Money:** Your sales manager will show you an average pre-need sale, the average commissions and, with the Earning Calculator, what you can do to earn more.
https://thesystemuniversity.com/pre-need_superstore/Planning-Worksheets-Counselor-Earning-Calculator-p47272607

__ **Daily Drill Down**

__ **Address** any concerns or questions you may have from the day before

__ **Review:** Your PPO you filled out on Day 1 with your Sales Manager and share what you learned from this experience.

__ **TSU Free Video:** “Ask Yourself this Question” (System Short: 2.26 minutes)
https://www.youtube.com/watch?time_continue=7&v=aDq9A2nCD_M

__ **Script:** Introduction to the Heritage Certificate Prospecting Script https://thesystemuniversity.com/pre-need_superstore/Quick-Scripts-Phone-Scripts-with-Objections-for-Cemetery-Prospecting-Heritage-Certificate-p48020623

__ **Counselor Online Library:** “Making the Appointment” <https://cld.bz/cMxhHxp>

__ **TSU Free Video:** “Getting Ready “ (System Short: 13 minutes)
https://www.youtube.com/watch?v=aDq9A2nCD_M

__ **Role Play:** Heritage Certificate Scripts and Objections

__ **Live Prospecting:** Use a scrubbed homeowner’s list and the Heritage Certificate script and objections

__ **LeadTrak:** Enter Lead, prospects and/or appointments into LeadTrak

__ **Q & A:** Ask any questions for clarification or a better understanding of the concepts and materials covered today, if needed.

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DAY 3

__ **Update** your Personal Goal Planner

__ **Daily Drill Down**

__ **Address** any concerns or questions you may have from the day before

__ **TSU Classroom Video:** “4321 – The Perfect 10 and the 3+2=My Favorite 5”

<https://courses.thesystemuniversity.com>

__ **Counselor Online Library:** “Making the Appointment”

<https://cld.bz/cMxhHxp>

__ **Script:** Introduction to the Living Will Prospecting Script. Find the script here:

https://thesystemuniversity.com/pre-need_superstore/Script-Living-Will-Kit-Presentation-p47687320

__ **TSU Classroom Video:** “Personal Planning Organizer Part One” and “Part Two”

<https://courses.thesystemuniversity.com>

__ **Role Play:** Living Will Scripts and Objections

__ **Live Prospecting:** Use a scrubbed homeowner’s list and the Living Will script

__ **LeadTrak:** Enter Lead, prospects and/or appointments into LeadTrak

__ **Q & A:** Ask any questions for clarification or a better understanding of the concepts and materials covered today, if needed.

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DAY 4

__ **Update** your Personal Goal Planner

__ **Daily Drill Down**

__ **Address** any concerns or questions you may have from the day before

__ **TSU Free Video:** “Why You Should Like Rejection” (System Short: 3:27 minutes)

<https://www.youtube.com/watch?v=sCkM6DxcSWQ>

__ **TSU Classroom Video:** “Park Roaming”

<https://courses.thesystemuniversity.com>

__ **Scripts:** Use the System Fast Start script cards as a quick way to help you remember the fundamentals of Park Roaming. Find the script cards here: https://thesystemuniversity.com/pre-need_superstore/Script-Cards-for-Online-Classes-Set-of-9-p36762501

__ **Select** your favorite method of prospecting which you have been exposed to thus far. Review and role play the script. Find additional script cards here (The Essential 17): https://thesystemuniversity.com/pre-need_superstore/The-Essential-17-Q-&-A-Flashcards-p47272575

__ **TSU Free Video:** “It Doesn’t Matter” (System Short: 3:18 minutes)

<https://www.youtube.com/watch?v=rWodoum9xnY>

__ **Role Play:** Objections to Setting an Appointment. If needed re-read Making the Appointment pages 9 -10. <https://cld.bz/cMxhHxp>

__ **Live Prospecting:** Use the list your manager provides and the favorite method you have selected.

__ **LeadTrak:** Enter Lead, prospects and/or appointments into LeadTrak

__ **Q & A:** Ask any questions for clarification or a better understanding of the concepts and materials covered today, if needed.

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DAY 5

__ **Update** your Personal Goal Planner

__ **Daily Drill Down**

__ **Address** any concerns or questions you may have from the day before

__ **TSU Classroom Video:** "Project Update and the Completion Program"
<https://courses.thesystemuniversity.com>

__ **Interactive:** You will now be given instructions on the File Review Process Completion Programs

__ **Role Play:** Select a different prospecting method, which you like. Review the script, Managing Objections, and roleplay

__ **Live Prospecting:** Using the list your manager provides you will prospect using the method you have selected for today

__ **LeadTrak:** Enter Lead, prospects and/or appointments into LeadTrak

__ **Q & A:** Ask any questions for clarification or a better understanding of the concepts and materials covered today, if needed.

Notes: _____

Initials Signifying Completion: Date _____ Trainee _____ Sales Manager _____

End of Week One : The expectations by the end of week one you should now understand the value of daily prospecting, the importance of tracking your daily activities and outcome, (as it relates to prospecting), using the goal planner and LeadTrak. You should have also have learned at least one prospecting script, know how to respond to the most common objections to setting an appointment and be on pace to setting at least 4 – 6 appointments a week.



WEEK TWO - Learning to Present

If you fail to make an effective presentation, then nothing else's matters.

In this second week of training, you are going to learn how to make a compelling and professional pre-need presentation. It is only by making a compelling presentation that your prospect is going to understand the problems that occur when families have not pre-planned. They will understand how planning before a time of need eliminates these problems and will give them peace of mind. The words and methods used in The System's pre-need presentation have been crafted to ensure you make not only a compelling presentation but one that is professional, ethical, and caring—supporting our core ideology of Service Selling.

DAY 6

__ **Update** your Personal Goal Planner

__ **Daily Drill Down**

__ **Address** any concerns or questions you may have from the day before

__ **TSU Classroom Video:** "One-Site Marketing"

<https://courses.thesystemuniversity.com>

__ **TSU Free Video:** "Your Pre-need Presentation – The Five Elements"

https://www.youtube.com/watch?time_continue=9&v=IMnYDwHD58c

__ **Introduction** and discussion to the process and value of the warm-up and the transition from the warm-up to the Personal Planning Organizer

__ **TSU Classroom Video:** "Personal Planning Organizer – Part Two"

<https://courses.thesystemuniversity.com>

__ **Rehearse:** Rehearse the PPO presentation with the accompanying training outline. Your manager will give you leads from the CRM that has never either been presented or sold. These are often very good prospects to contact. Your sales manager will share with you the appropriate script.

__ **Live Prospecting:** Prospect from the list in the CRM and the script supplied by your sales manager

__ **LeadTrak:** Enter Lead, prospects and/or appointments into LeadTrak

__ **Q & A:** Ask any questions for clarification or a better understanding of the concepts and materials covered today, if needed.

Notes: _____

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DAY 7

__ **Update** your Personal Goal Planner

__ **Daily Drill Down**

__ **Address** any concerns or questions you may have from the day before

__ **TSU Free Video:** “Making the First Sale” (System Short: 3:00 minutes)

https://www.youtube.com/watch?time_continue=15&v=FowxKsuaJD0

__ **Quiz:** Define the Five Elements of an Effective Presentation. If needed, re-watch
“Your Pre-need Presentation – The Five Elements” (System Short: 4:24 minutes)

https://www.youtube.com/watch?time_continue=9&v=IMnYDwHD58c

__ **TSU Classroom Video:** “Deed or Certificate Delivery”

<https://courses.thesystemuniversity.com>

__ **Discuss** with your sales manager what you learned about the value of lead generating sources.

__ **Role Play** objections to setting an appointment

__ **Live Prospecting:** Today you and your sales manager will discuss the area and/or type of prospecting that may be the most challenging for you. He or she will coach you regarding this method, then you will conduct live prospecting to use the new skills or understanding you gained from your coaching session.

__ **LeadTrak:** Enter Lead, prospects and/or appointments into LeadTrak

__ **Q & A:** Ask any questions for clarification or a better understanding of the concepts and materials covered today, if needed.

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DAY 8

__ **Update** your Personal Goal Planner

__ **Daily Drill Down**

__ **Address** any concerns or questions you may have from the day before

__ **TSU Free Video:** "Why People Don't Prospect" (System Short: Run Time 4:34)
<https://www.youtube.com/watch?v=oJz1Qj9XlZE>

__ **Role Play** warm up, transition to the PPO, and the PPO . If needed re-watch the PPO Presentation.
<https://courses.thesystemuniversity.com>

__ **TSU Classroom Video:** "The Pre-Need Presentation." <https://courses.thesystemuniversity.com>
You can find the Pre-Need 4-Page Presentation here: https://thesystemuniversity.com/pre-need_superstore/The-Pre-Need-Presentation-p36762479?forcescroll=true

__ **Rehearse** the transition from the PPO to the 4-page presentation

__ **Study:** Rehearse giving the four-page pre-need presentation, using the accompanying script book.
https://thesystemuniversity.com/pre-need_superstore/Script-The-Pre-Need-Presentation-p47687282?forcescroll=true

__ **Role play** three of the most common objections to setting an appointment

__ **Live Prospecting.** The type of prospecting you will do today will be at the sales manager's discretion

__ **LeadTrak:** Enter Lead, prospects and/or appointments into LeadTrak

__ **Q & A:** Ask any questions for clarification or a better understanding of the concepts and materials covered today, if needed.

Notes: _____

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DAY 9

__ **Update** your Personal Goal Planner

__ **Daily Drill Down**

__ **Address** any concerns or questions you may have from the day before

__ **TSU Free Video:** "Seasonal Objections" (System Short: Run Time 12:34)
<https://www.youtube.com/watch?v=Cnf0NgHE-TE>

__ **Discussion:** You will have a discussion with your sales manager about how critical it is that your prospect every day. You will also talk about how you are dealing with rejection, what improvements you have made (or need to make), regarding managing objections and setting a minimum of two appointments a day.

__ **TSU Classroom Video:** Re-watch "The Pre-Need Presentation."
<https://courses.thesystemuniversity.com>

__ **Role play** the transition from the PPO to the Pre-Need Presentation and presenting the four-page Pre-Need Presentation.

__ **Live Prospecting.** Today, you get to select the prospecting method you feel the most comfortable with and feel you are the most effective.

__ **LeadTrak:** Enter Lead, prospects and/or appointments into LeadTrak

__ **Q & A:** Ask any questions for clarification or a better understanding of the concepts and materials covered today, if needed.

Notes: _____

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DAY 10

__ **Update** your Personal Goal Planner

__ **Daily Drill Down**

__ **Address** any concerns or questions you may have from the day before

__ **TSU Free Video:** "Have You Checked Your Schedule Today?" (System Short: Run Time 3:02)

<https://www.youtube.com/watch?v=C4fEVKE-0aw>

__ **TSU Classroom Video:** Re-watch "Personal Planning Organizer – Part Two"

<https://courses.thesystemuniversity.com>

__ **Role Play** the warm-up, the transition to the PPO, and the transition from the PPO to the four-page Pre-Need Presentation.

__ **Discussion.** After this roleplay is completed, your sales manager will share with you the areas you will need to improve. To do this you will re-watch some of the videos, study the PPO or the four-page Pre-Need Presentation scripts. You may also be assigned to read some of the related materials in The System Library

__ **TSU Free Video:** "Are You Selling Yourself Out of Business?" (System Short: Run Time 3:26)

<https://www.youtube.com/watch?v=R763pfPVXtk>

__ **TSU Free Video:** "The C.R.I.S.P. Method (System Short: Run Time 8:42)

https://www.youtube.com/watch?time_continue=410&v=pmeaRQEQRMM

__ **Review** the C.R.I.S.P script and process

__ **TSU Classroom Video:** "Referrals" <https://courses.thesystemuniversity.com>

__ **Discuss** with your sales manager what you now know about the importance of asking for referrals, how to obtain referrals and why the obtainment of referrals must be a vital part of your selling process

__ **LeadTrak:** Enter Lead, prospects and/or appointments into LeadTrak

__ **Q & A:** Ask any questions for clarification or a better understanding of the concepts and materials covered today, if needed.

Notes: _____

Initials Signifying Completion: Date _____ Trainee _____ Sales Manager _____

End of Week Two: The expectation is that by the end of week two you should be on a pace of setting two pre-need appointments each day. You should be know how to conduct a proper warm-up, how to make the transition from the warm-up to the PPO and be relativity proficient at presenting the PPO and four-page preneed presentations. You should be very clear regarding the importance of making referral obtainment as a part of your selling system, to ensure that you are not be selling yourself out of business, but always asking your way into new possibilities.



WEEK THREE – Learning to Close the Sale

If you are unable to help a family make the decisions to secure the protection that pre-planning provides them, then nothing else's matters.

This week, you are going to learn how to help your prospect make the decision to secure the protection and peace of mind gives them when they plan before a time of need. You will discover that no family will ever say no to the responsibility. However, many of them will say “Not now.” In more cases than not, this is simply a form of stalling or putting this discussion off, because it has to do with their death. Your job as a caring professional is to effectively manage past their objections and help them make a decision they are most likely never going to make with you.

DAY 11

__ **Update** your Personal Goal Planner

__ **Daily Drill Down**

__ **Address** any concerns or questions you may have from the day before

__ **TSU Free Video:** “I Forgot” https://www.youtube.com/watch?time_continue=2&v=FsE7Sbz49Ik

__ **Role Play** the C.R.I.S.P. referral method. If needed re-watch the System Short on C.R.I.S.P.
https://www.youtube.com/watch?time_continue=410&v=pmeaRQEqrMM

__ **Role Play** any objections to setting the appointment that may be giving you a challenge

__ **TSU Free Video:** “Seasonal Objections” (System Short: Run Time 12:35)
<https://www.youtube.com/watch?v=Cnf0NgHE-TE>

__ **Discuss** any concerns you have or areas you feel you need to improve your prospecting activities and outcomes.

__ **TSU Classroom Video:** “The Closing Process” <https://courses.thesystemuniversity.com>

__ **Discuss** what you learned and/or what questions you may have regarding the closing process.

__ **Counselor Online Library:** “Managing Objections” <https://cld.bz/d6s9mht>

__ **Role play** the warm-up, transition to the PPO, and the PPO presentation. If needed re-watch the classroom video of the PPO Presentation – Part 2.

__ **Live Prospecting:** Sales manager’s choice

__ **LeadTrak:** Enter Lead, prospects and/or appointments into LeadTrak

__ **Q & A:** Ask any questions for clarification or a better understanding of the concepts and materials covered today, if needed

Notes: _____

Initials Signifying Completion: Date _____ Trainee _____ Sales Manager _____



DAY 12

__ **Update** your Personal Goal Planner

__ **Daily Drill Down**

__ **Address any concerns or questions you may have from the day before**

__ **Role play** the transition from the warm-up to the PPO and give the PPO presentation

__ **Discussion:** Your sales manager will give you any direction you may need on which areas of the part of the pre-need presentation you may need to improve

__ **Counselor Online Library:** "Managing Objections" <https://cld.bz/d6s9mht>

__ **Review** the 4 –A's script card from the Counselor's Fast Start series
https://thesystemuniversity.com/pre-need_superstore/Script-Cards-for-Online-Classes-Set-of-9-p36762501

__ **Select** one of the most common objections to closing the sale. Then by following the process of using the 4-A's method, manage the objection and get back into a closing situation

__ **Introduction** to the Important Cemetery Decisions brochure/worksheet
https://thesystemuniversity.com/pre-need_superstore/Price-Comparison-Worksheet-p47272537

__ **TSU Classroom Video:** "Important Cemetery Decisions" <https://courses.thesystemuniversity.com>

__ **Role Play:** Your sales manager will create mock selection situation which will allow you to roleplay using the Important Cemetery Decisions worksheet

__ **Role Play** any objections that are the most challenging to you when setting an appointment with your sales manager

__ **Live Prospecting:** Sales manager's choice

__ **LeadTrak:** Enter Lead, prospects and/or appointments into LeadTrak

__ **Q & A:** Ask any questions for clarification or a better understanding of the concepts and materials covered today, if needed

Notes: _____

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DAY 13

__ **Update** your Personal Goal Planner

__ **Daily Drill Down**

__ **Address** any concerns or questions you may have from the day before

__ **TSU Free Video:** "Do You Have A Presentation For This?" (System Short: Run Time 3:32)
https://www.youtube.com/watch?time_continue=10&v=iUiPbh97-qQ

__ **Role Play** C.R.I.S.P. script

__ **TSU Classroom Video:** "The Pre-Need Presentation" <https://courses.thesystemuniversity.com>

__ **Role Play** the transition from the PPO to the four-page Pre-Need Presentation. Present page one and two of the Pre-Need Presentation. At this point, your sales manager will show you how to explain the product and service offering to the prospect. At the end of page 2, you will know learn how to transition to and explain the products, services, and pricing. You will then learn how to transition back into the closing sequence of your four-page presentation, which are pages three and four.

__ **Counselor Online Library:** "Managing Objections" <https://cld.bz/d6s9mht> Your sales manager will select specific objections from the book and ask you to read and learn how to manage them properly

__ **Role Play** managing the objections you were assigned using the 4-A's method

__ **Role Play** the prospecting script your manager will be having you use today and role play handling the two objections to setting an appointment that are the most challenging to you.

__ **Live Prospecting:** Sales manager's choice

__ **LeadTrak:** Enter Lead, prospects and/or appointments into LeadTrak

__ **Q & A:** Ask any questions for clarification or a better understanding of the concepts and materials covered today, if needed

Notes: _____

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DAY 14

__ **Update** your Personal Goal Planner

__ **Daily Drill Down**

__ **Address** any concerns or questions you may have from the day before

__ **TSU Free Video:** "The Five Elements of an Effective Pre-Need Presentation" (System Short: 4:24 minutes) https://www.youtube.com/watch?time_continue=9&v=IMnYDwHD58c

__ **TSU Classroom Video:** "The Closing Process" <https://courses.thesystemuniversity.com>

__ **Role Play** pages 3 and 4 of the Pre-Need Presentation. Move from the question of asking your prospect if they agree it is better to do this together than alone, then go into the Important Cemetery Decisions explanation and move into your payment options (or other price comparisons if you are discussing pre-need funerals).

__ **TSU Classroom Video:** If needed, re-watch "The Pre-Need Presentation" from page 3 to the end. <https://courses.thesystemuniversity.com>

__ **TSU Classroom Video:** If needed, re-watch Important Cemetery Decisions <https://courses.thesystemuniversity.com>

__ **Role Play** how to transition from Important Cemetery Decisions and showing the payment options to starting the agreement (or other price comparisons if you are discussing pre-need funerals). At this point, your manager will share with you more about the more frequent products that family select and their respective pricing.

__ **Role Play** any objection to setting the appointment that may be difficult for you to manage.

__ **Live Prospecting:** Sales manager's choice

__ **LeadTrak:** Enter Lead, prospects and/or appointments into LeadTrak

__ **Q & A:** Ask any questions for clarification or a better understanding of the concepts and materials covered today, if needed

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DAY 15

__ **Update** your Personal Goal Planner

__ **Daily Drill Down**

__ **Address** any concerns or questions you may have from the day before

__ **Review** the products and pricing from the previous day to ensure you know the products and pricing

__ **TSU Classroom Video:** Re-watch "Personal Planning Organizer – Part Two".

<https://courses.thesystemuniversity.com>

__ **Role Play** the warm-up, the transition to the PPO, and give a complete PPO presentation.

__ **Read** the pages as directed by your sales manager from the PPO presentation which he or she feels you need a better understanding of how to explain specific pages.

__ **Role Play** with your sales manager three of the most common objections you will get when attempting to close a sale.

__ **Counselor Online Library:** "The Closing Process" <https://cld.bz/z8cFNxp>

__ **Live Prospecting:** Discuss with your manager the three methods of prospecting you now feel you are most comfortable using. Then, select one of the three and use that method for your daily prospecting efforts.

__ **LeadTrak:** Enter Lead, prospects and/or appointments into LeadTrak

__ **Q & A:** Ask any questions for clarification or a better understanding of the concepts and materials covered today, if needed

Notes: _____

Initials Signifying Completion: Date _____ Trainee _____ Sales Manager _____

End of Week Three: The expectation is that by the end of the third week you should be setting a minimum of two pre-need appointments every day. You should also know how to make a complete pre-need presentation, effectively use the Important Cemetery Decisions sheet, explain the payment options, manage at least three of the most common objections to purchasing, and then be able to move into the closing sequence.



WEEK FOUR – Staying Brilliant at the Basics

If you drift from the basic fundamentals of this proven pre-need selling system, because you think you have a better way, your sales will start to diminish. When that happens, then nothing else matters.

In this fourth week of training, you are going to continue to learn, do, and review. You will get into more detail about the products, services, pricing, and financing options your company offers. You will also be giving a complete Pre-Need Presentation and you will be reviewing and re-taking many of the videos, and re-reading materials. The overriding goal this week is discovering any weaknesses in your selling process, help you improve, and insure you are clear on how the elements of this proven pre-need selling system will lead you to success. Repetition is the foundation of all learning. The importance of repetition is nothing new. In ancient Greece, Aristotle commented on the role of repetition at it relates to learning: *“It is frequent repetition that produces a natural tendency.”*

DAY 16

__ **Update** your Personal Goal Planner

__ **Daily Drill Down**

__ **Address** any concerns or questions you may have from the day before

__ **Explain** to your manager the 4-3-2-1 concept and the concept of 3 + 2

__ **Define** C.R.I.S.P., give the C.R.I.S.P. presentation and explain why referrals are a great lead source

__ **Role Play** with your manager all the most common objections to the appointment, how to manage them properly and then, ask for the appointment

__ **TSU Classroom Video:** “On-Site Marketing” <https://courses.thesystemuniversity.com>

__ **Counselor Online Library:** Read pages 6-8 of “Prospecting – Making the Appointment”
<https://cld.bz/cMxhHxpe>

__ **Live Prospecting:** Use one of your three favorite methods

__ **LeadTrak:** Enter Lead, prospects and/or appointments into LeadTrak

__ **Q & A:** Ask any questions for clarification or a better understanding of the concepts and materials covered today, if needed

Notes: _____

Initials Signifying Completion: Date _____ Trainee _____ Sales Manager _____



DAY 17

__ **Update** your Personal Goal Planner

__ **Daily Drill Down**

__ **Address** any concerns or questions you may have from the day before

__ **TSU Classroom Video:** Re-watch “Personal Planning Organizer – Part Two”
<https://courses.thesystemuniversity.com>

__ **Discuss** with your manager how you better understand the value of the PPO than you did the first time you watched this video.

__ **Role Play** the warm-up and the transition to the PPO, and present the PPO

__ **Review** product, service, and pricing with the manager

__ **TSU Classroom Video:** “4-3-2-1 The Perfect 10 and 3+2 = My Favorite Five”
<https://courses.thesystemuniversity.com>

__ **TSU Classroom Video:** “Office Inquires” <https://courses.thesystemuniversity.com>

__ **Discuss** with your sales manager what you learned by taking this course

__ **Live Prospecting:** Use one of your three favorite methods

__ **LeadTrak:** Enter Lead, prospects and/or appointments into LeadTrak

__ **Q & A:** Ask any questions for clarification or a better understanding of the concepts and materials covered today, if needed

Notes: _____

Initials Signifying Completion: Date _____ Trainee _____ Sales Manager _____



DAY 18

__ **Update** your Personal Goal Planner

__ **Daily Drill Down**

__ **Address** any concerns or questions you may have from the day before

__ **Role Play** any prospecting scripts in which you need to improve

__ **Role Play** any objections to setting the appointment you may not be proficient in managing

__ **TSU Classroom Video:** The Pre-Need Presentation <https://courses.thesystemuniversity.com>

__ **Role Play** from the transition from the PPO to the four-page Pre-Need Presentation, give the four-page presentation. This should include explaining your products and services, going through the closing sequence, using the important cemetery decisions worksheet, and managing the objections to the sales which your manager will give you.

__ **TSU Classroom Video:** "Park Roaming & ASSAY Program" <https://courses.thesystemuniversity.com>

__ **Live Prospecting:** Sales manager's choice

__ **LeadTrak:** Enter Lead, prospects and/or appointments into LeadTrak

__ **Q & A:** Ask any questions for clarification or a better understanding of the concepts and materials covered today, if needed

Notes: _____

Initials Signifying Completion: Date _____ Trainee _____ Sales Manager _____



DAY 19

__ **Update** your Personal Goal Planner

__ **Daily Drill Down**

__ **Address** any concerns or questions you may have from the day before

__ **Role Play** any aspects of your prospecting and objections to setting the appointment you are not as proficient as you need to be, as determined either by your lack of confidence or your manager's opinion of where you need improvement

__ **Role Play** the important cemetery decisions (or other price comparisons if you are discussing pre-need funerals), and transition from this explanation to the close.

__ **TSU Classroom Video:** If needed re-watch "Important Cemetery Decisions"
<https://courses.thesystemuniversity.com>

__ **Role Play** three of the most common objections to closing the sales

__ **TSU Classroom Video:** "The Closing Process" <https://courses.thesystemuniversity.com>

__ **Discuss** with your manager what you now better understand when it comes to managing objections than you did the first time you took this course

__ **Role Play** managing objection to purchasing, as given to you by your sales manager by using the 4 A's concept

__ **Live Prospecting:** Sales manager's choice

__ **LeadTrak:** Enter Lead, prospects and/or appointments into LeadTrak

__ **Q & A:** Ask any questions for clarification or a better understanding of the concepts and materials covered today, if needed

Notes: _____

Initials Signifying Completion: Date _____ Trainee _____ Sales Manager _____



DAY 20

__ **Update** your Personal Goal Planner

__ **Daily Drill Down**

__ **Address** any concerns or questions you may have from the day before

__ **Give** your sales manager a complete pre-need presentation from the warm-up to obtaining referrals

__ **Coaching:** After this roleplaying session, your sales manager will coach you on the areas in which you need to make improvement and assign you the appropriate training methods to help you continue your development

__ **Training Schedule:** At this point your sales manager will create a schedule for you, week by week, that will include working on areas you may need additional improvement, additional courses you will need to take or re-take, along with materials they will want you to read or re-read in The System Library along with videos they will want you to watch or re-watch. Why? Let us not forget these powerful words from the ages: *"It is frequent repetition that produces a natural tendency."* Aristotle

__ **LeadTrak:** Enter Lead, prospects and/or appointments into LeadTrak

__ **Q & A:** Ask any questions for clarification or a better understanding of the concepts and materials covered today, if needed

Notes: _____

Initials Signifying Completion: Date _____ Trainee _____ Sales Manager _____

End of Week Four: The expectation is that by the end of your fourth week you are now setting two pre-need appointments every day. You should be very capable of giving a complete pre-need presentation, managing the most common objections, explaining the price and payment options, and know how to professionally lead your prospect to make the wise and loving decision to secure the protection and peace of mind that before need planning offers.

