



Your Journey Forward

Implementation Guide

Support, Healing and Life After Loss

Purpose of this Guide

This implementation guide is designed to help funeral home staff consistently and compassionately introduce Your Journey Forward to families. It outlines exactly when and how to present each component of the kit, provides scripting and talking points, and includes workflow options based on your staffing model.

Whether you have a full-time aftercare specialist, a funeral director taking on multiple roles or a rotating support team, this guide ensures a consistent and supportive experience for every family served.

Key Objectives

01

Deliver consistent, compassionate
aftercare to every family

02

Clearly introduce the Your Journey
Forward materials as an extension of care

03

Set the stage for long-term support and
eventual preplanning conversations

04

Equip staff with practical tools and
language to build trust and confidence

Why This Conversation Matters

The aftercare meeting is an opportunity to extend meaningful support, foster trust and provide guidance on practical and emotional next steps. By offering resources, reassurance and options in a compassionate way, we help families feel supported in both their grief and planning for the future.

These conversations aren't about scripts or sales — they're about meaningful connection. Each family's experience is unique, and this meeting allows us to meet them where they are, offering support that aligns with their needs.

Use these key topics and gentle conversation starters as a guide. They are designed to create open, natural dialogue, ensuring families leave with a sense of care, clarity and direction.

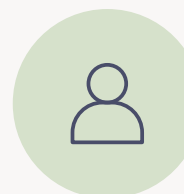
Opt-Out Etiquette & Handling Rejections with Grace

Not every family will be open to continued follow-up or ready to talk about preplanning — and that's completely okay. Opt-outs aren't failures; they're often a sign that the timing just isn't right. When handled with care and sincerity, these moments can still be meaningful, preserving trust and keeping the relationship intact for when the family may be ready in the future.

Respect boundaries — If a family declines additional communication, honor that decision with warmth and without hesitation.

Normalize gently — Let families know it's perfectly natural to feel like now isn't the right time.

Offer reassurance — Keep the door open, reminding them that you'll be here if their needs or readiness shift down the road.



Sample 1: General Opt-Out

"Of course — thank you for letting me know. I'll be sure we update that accordingly on our end. Please don't hesitate to reach back out if there's anything we can do for you down the road. We're always here if that ever changes. Our thoughts to you."



Sample 2: Preneed Hesitation

"I completely understand — everyone's timing is different, and it's important that it feels right for you. If it ever feels helpful to talk through future plans, whether that's soon or sometime down the road, know we'll be here when you're ready. Keeping you in our thoughts."

Your Journey Forward Workflow

Meaningful support at every touchpoint...



1

Step 1

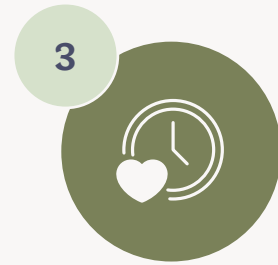
BEFORE the aftercare appointment:
Introduce Aftercare Concept + Schedule Aftercare Appointment During The At-Need Arrangement



2

Step 2

DURING the aftercare appointment:
Walk Through Aftercare Guide +
Provide Next Steps



3

Step 3

AFTER the aftercare appointment:
Offer Ongoing Touchpoints: Send Thank-You,
Follow-Up And Continued Support



4

Step 4

WHEN READY — Schedule preneed appointment:
Offer Preened Planning Appointment When Family is Ready

BEFORE the aftercare appointment:

At the Time of Arrangement

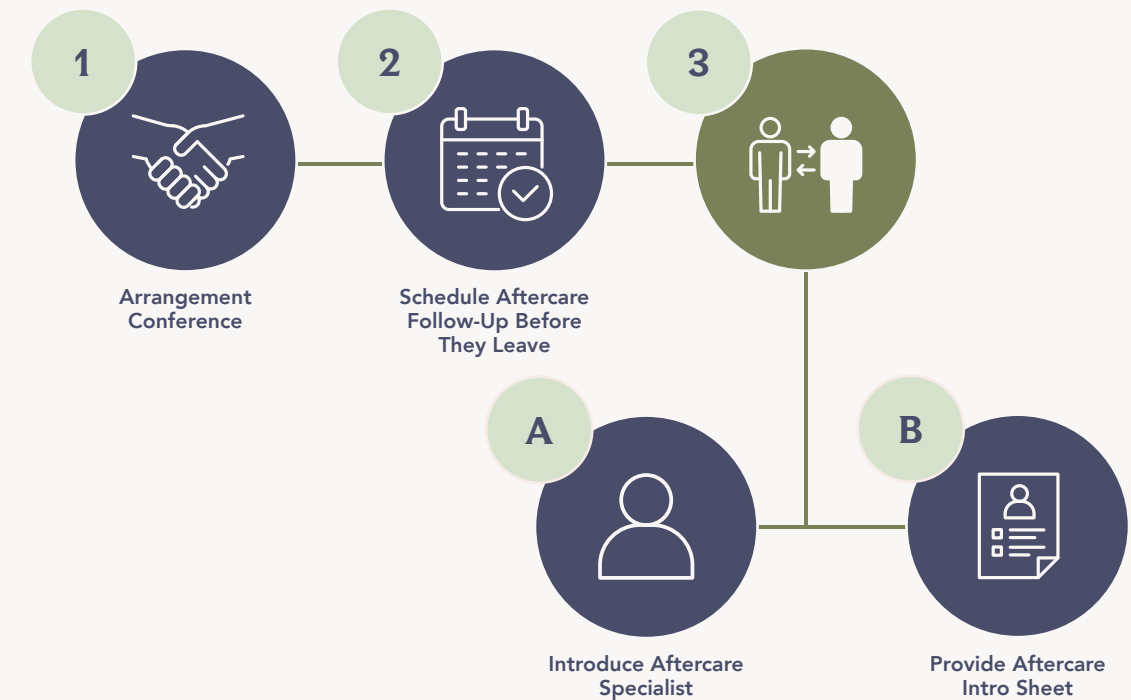
Introducing aftercare during at-need arrangements reassures families that they are not alone after the funeral. This is when emotions and logistics feel overwhelming, making structured follow-up essential. Further, scheduling an aftercare/follow-up appointment at the time of arrangement ensures a seamless transition to ongoing support.

Setting The Stage:

Introducing Aftercare: The Funeral Director's Role



BEFORE the aftercare appointment



Step 1
Arrangement Conference

Step 2
Introduce Aftercare & Schedule Follow-Up

Step 3
Meet Aftercare Specialist or Provide Intro Sheet

- **Option A:** If the aftercare specialist is available
- **Option B:** If the aftercare specialist is unavailable

From Arrangement to Aftercare

Initial Conversation

Goals:

- Gently introduce aftercare program and/or staff, if available
- Schedule the follow-up

Best Practices for Scheduling:

- Schedule the aftercare appointment before they leave the arrangement conference (ideally within 1-2 weeks of the service).
- Verbally framing the arrangement conference as the first of two meetings gives families a clear roadmap and a direct connection to their funeral provider, reinforcing their ongoing care and support.
- This also ensures families receive timely support during the critical first weeks after the service, when emotions and logistical concerns are often highest. Some firms also use this meeting to finalize important details, such as delivering death certificates or providing additional thank-you notes.

Scripting: At the onset of the arrangement: "As we plan today, know this is just the first step. Before you leave, we'll schedule a follow-up meeting a week or two after the service to check in, provide resources and answer any questions. This ensures you have continued support and a direct connection to us whenever you need it."

- Include a "Meet Your Aftercare Specialist" card in the at-need folder.
- Preneed specialists often have busy schedules. If you're not the person conducting the aftercare follow-up meeting and didn't have the chance to connect with the family in person during arrangements, use our **Aftercare Intro Sheet** to introduce who they will meet with next. This helps put a face to a name, providing reassurance and continuity. Place it in the folder they take home with other important documents from the arrangement.
- Include the introduction and scheduling of aftercare follow-up meeting to the **funeral director's checklist**. Adding aftercare scheduling to the funeral director's checklist ensures every family receives the follow-up support they need. This step should never be overlooked.

Script/Language Suggestions

To schedule the follow-up meeting:



"We know the days and weeks ahead can feel overwhelming. To help, we schedule a follow-up meeting to check in, share resources and answer any questions that may have come up. Let's set that up now, just so it's on the calendar."

If the aftercare/preneed specialist is available:

"I'd like to introduce you to [Tracy], who is part of our team and will be meeting with you for that follow-up. She specializes in helping families beyond the service and will be a continued source of care and help for you all."

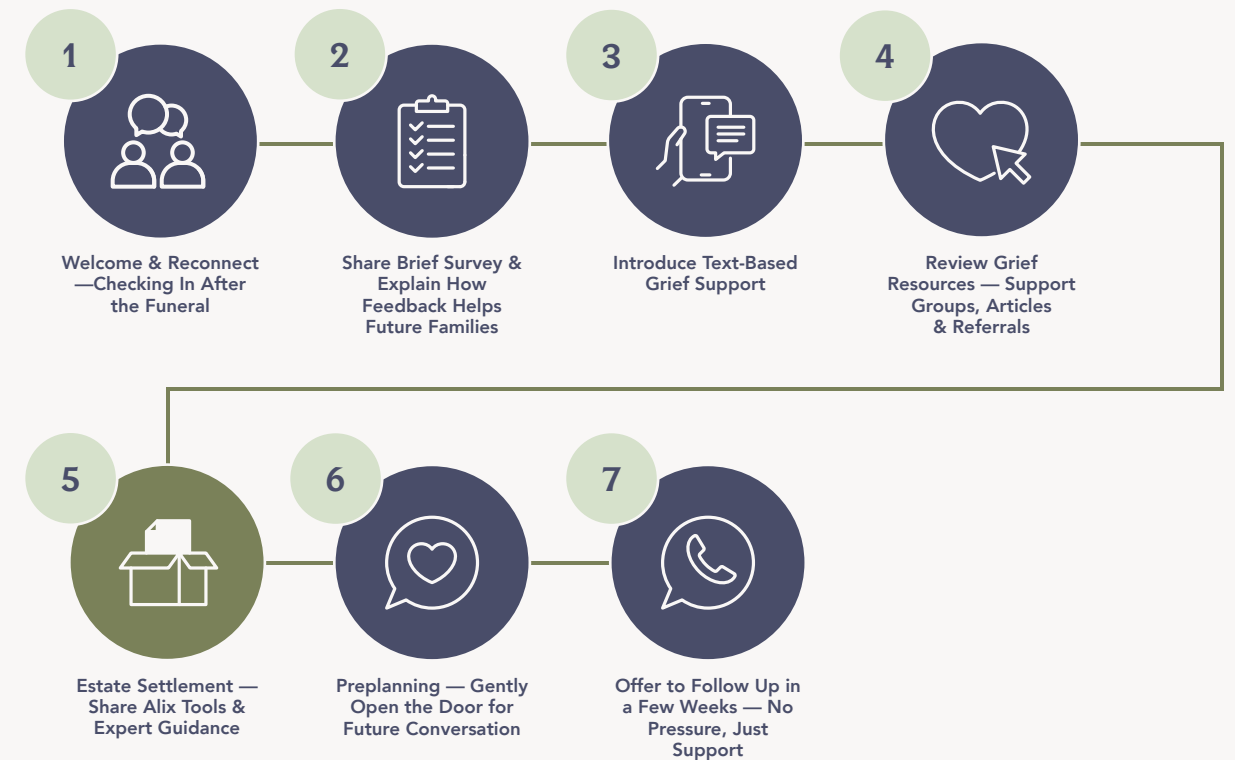
If they're unavailable:

"You'll be meeting with [Tracy]. While she is meeting with another family right now, I'd love to give you this card so you can put a face with the name. She's someone who works closely with families after the funeral to make sure they feel supported and cared for. Her role is truly about helping people through everything after the funeral. I'll tuck this into our folder that is going home with you, so you have it."

DURING the aftercare appointment:

The aftercare appointment ensures families feel supported beyond the funeral service. It provides practical resources, grief support and next steps while creating space for conversation. This is where the Your Journey Forward kit is introduced, helping families navigate grief, stay organized and consider preplanning when ready.

Aftercare Appointment



Step 1
Welcome & Reconnect

Step 2
Introduce the Survey

Step 3
Explain/Text-Based Grief Support

Step 4
Review Grief Resources

Step 5
Walk Through Estate Settlement Tools

Step 6
Introduce Preplanning as a Future Option

Step 7
Offer Follow-Up

Goal

Using the Your Journey Forward kit as a guide, walk families through helpful **practical support, emotional resources and gently transition** into preplanning if/when appropriate.

Opening Language

"Just because the services are finished doesn't mean our care for you has ended. We're still here for you and today is about extending that support in the days, weeks and months to come. We'll walk through our Aftercare Guide together, so you feel confident knowing what resources are available and can revisit it whenever you need."

5 Key Topics to Discuss

1. Elevia Flyer: Survey Request & Text-Based Aftercare Intro

Why it matters: The survey helps improve our care for future families. Elevia provides grief support through thoughtful text-based aftercare.

Conversation Starters:

"At the heart of what we do is care — and that includes listening and learning. You'll receive a short survey soon, and if you feel comfortable sharing your thoughts, we'd be truly grateful. It only takes a few minutes, but your feedback helps us understand how we can better support families like yours moving forward."

"Over the next few months, you may receive occasional text messages from [Elizabeth], our grief support companion. It's not automated spam — it's a real, thoughtful resource to help you navigate the weeks and months ahead with care and support."

2. For Grief Flyer: Grief Support Resources & Ongoing Care

Why it matters: Families often feel isolated in their grief. Providing tangible support options reassures them that they are not alone.

Conversation Starters:

"Grief doesn't follow a timeline, and it looks different for everyone. We offer several resources — some people appreciate support groups, others prefer reading materials or quiet reflection. As you can see, we provide many free resources and connections and encourage you to look through these."

"We also have grief resources on our website under our __tab. If there are people in your family that may find that helpful, please feel free to share that with them."

3. Alix Flyer: Understanding Estate Settlement

Why it matters: Closing financial, personal and digital affairs after a loss can be time-consuming and complex. The Alix Estate Settlement service helps streamline this process and prevent common pitfalls. We offer free support.

Conversation Starters:

"As you may have already experienced, settling your loved one's affairs can be overwhelming — most families spend 600-900 hours on this process. We have a resource, Alix, that helps guide and simplify these steps."

"As part of our commitment to continued care, we offer a free Estate Review through Alix. It provides a personalized settlement plan, checklists and professional guidance to make sure nothing is overlooked."

Key points to share:

- **Alix provides expert estate settlement assistance to help families navigate the legal and financial steps after a loss.**
- **Families receive a free Alix Estate Review (\$249 value) through the funeral provider, including a consultation, customized settlement guide, fraud protection guidance and assistance with assets, debts and probate.**

4. Aftercare Checklist: Organizing Tasks & Practical Next Steps

Why it matters: This checklist offers a compassionate, easy-to-follow guide to help families stay organized during a time that can feel overwhelming. It's comprehensive, but not all-inclusive, and is meant to be a supportive starting point — not a to-do list they must tackle alone.

Conversation Starters:

"We've found that families often don't know where to begin when it comes to practical matters after a loss. This checklist breaks things down into manageable pieces — what to take care of now, what can wait and what to ask for help with."

"You don't have to do everything at once, and you're not expected to have it all figured out. This guide gives you a place to start and lets you move at your own pace."

5. Preplanning Guide: Transitioning to Preplanning

Why it matters: After experiencing a loss, many people naturally begin thinking about their own wishes, but they may need time.

The Preplanning Guide is a **gentle, unintrusive** way to begin that conversation, providing a place for thoughts, preferences and memories to be recorded without pressure. This is about **offering, not pushing**.

In fact, **many families choose to preplan at this stage** — not only to feel more at peace but to ease the burden on those they love. It's a thoughtful, compassionate step that gives people a sense of control and clarity moving forward.

Conversation Starters:

"Often, after walking through the loss of someone close, people begin to think about their own wishes. This guide isn't meant to rush that process — but it's simply a gentle way to begin capturing those thoughts, whenever the time feels right. Many families find that preplanning brings a real sense of peace, and it's a step a lot of people choose to take at this point. Would it be alright if I followed up in a few weeks to see how you're feeling about it? No pressure at all — just a chance to talk, if and when it feels helpful."

"Some people want to act quickly and get things in order. Others need time and space. We respect both. This guide is here whenever you're ready. Preplanning is something many families do at this stage to make things easier for their own loved ones. Would it be alright if I checked in with you in a few weeks to see where you're at? Just a gentle follow-up, if that feels okay."

Compassionate Approaches

- **Make it a conversation, not a checklist** — Listen more than you talk.
- **Validate emotions** — Let families guide where the discussion goes.
- **Leave resources behind** — Provide grief support materials, the aftercare checklist and preplanning options without pressure.
- **Normalize preplanning** — Gently share that many families choose to preplan at this stage as a way to help their loved ones and find peace of mind.
- **Follow up in a meaningful way** – A handwritten note, a phone call or an invitation to an upcoming grief support event can go a long way.

AFTER the aftercare appointment

Aftercare doesn't end with the first appointment — it's an ongoing expression of care. These gentle follow-ups help nurture trust, provide continued support and naturally open the door for future planning. The goal is to stay present, offering guidance when the family is ready.

Post-Appointment Touchpoints that Build Trust



Step 1:
2-4 days after
— Post-Appointment Thank You

Step 2:
3-4 weeks after
— First Check-In

Step 3:
1-2 months after
— Reconnect with Resource

Each of these touchpoints is a reflection of your continued care.

Done well, they:

- Reinforce your commitment to care beyond the service
- Encourage families to re-engage with grief and planning resources
- Keep the experience deeply personal and human — not transactional

Extending Care with Intention:

Three post-appointment touchpoints

A Few Days After the Aftercare Appointment: Thank You Touchpoint

Purpose: Reaffirm connection, show gratitude and keep the door open.
Why it matters: A handwritten note or thoughtful email reminds the family that your care is genuine, ongoing and not transactional. It helps deepen trust without adding pressure.

Touchpoint:



Sample Script for Note/Email

“It was truly a privilege to connect with you last week. I know there’s a lot to process right now, and I just wanted you to know I’m here if any questions come up. You’re not alone in this — we’re here to walk with you however we can.”

Several Weeks After the Aftercare Appointment: First Gentle Check-In

Purpose: Maintain connection, normalize preplanning interest.

Why it matters: Many families begin reflecting more deeply around this time. A soft, compassionate check-in honors where they are while gently offering continued support.

Touchpoint:

Reach out via phone, email or text — whichever the family prefers.



Sample Script (Phone/Email/Text)

"I just wanted to gently check in and see how you've been doing since we last spoke. I know everyone moves through this process in their own time. If it would be helpful to talk more about planning ahead — or anything else — I'm here. Keeping you in my thoughts."

A Month or Two After the Aftercare Appointment: Reconnect with a Seasonal or Milestone Resource

Purpose: Sustain long-term support, share helpful content and reopen the preplanning invitation.

Why it matters: Around 30–60 days is a natural point when some people begin feeling ready to organize next steps. Offering relevant resources at this time feels thoughtful, not pushy.

Touchpoint:

Send a seasonal grief booklet, "Thinking of You" note or helpful article. Include a preplanning reminder worded with care.



Sample Script (Card or Email Insert)

Consider adding something like this to your note:

"I wanted to send along this resource, as I know this season can be especially tender. You've been in our thoughts. If or when the time feels right to revisit anything we discussed — I'd be happy to talk through it again. Our thoughts are with you, [name]."

Bringing It All Together

Your Journey Forward isn't just a folder — it's a promise.

It represents your ongoing commitment to families — that your care doesn't end when the service is over. Instead, it continues through follow-up, guidance and gentle support in the days, weeks and months that follow.

The Message You Leave Behind

This guide was created to **make your ongoing care easier to deliver** — no matter your team size or role. Whether you're the funeral director, a preneed specialist or someone in a support role, it gives you a simple, consistent way to walk families through emotional and practical support.

“

*Every conversation, every check-in,
every kind gesture says:*

*“You are not alone.
We're still here.
And we'll keep
showing up.”*

”

Support Tools for Sales & Aftercare Pros

Check out this curated list of resources to help you build confidence and compassion in handling these conversations — whether you're helping a grieving family or navigating sensitive sales moments. Each item is picked to strengthen your empathy, communication and objection-handling skills.



SCAN ME

Podcasts

The Science of Success — “Emotional Intelligence 2.0” with Dr. Travis Bradberry: Learn how to navigate emotional conversations using EQ.

Call Reluctance Coach — “Handling Objections with Compassion”: Quick mindset tips for sales conversations that feel personal or tough.

The Sales Evangelist — “Objection Handling That Builds Trust”: Tools for selling with empathy when timing or topics are sensitive.

Videos

“How to Handle Objections in Sales Without Feeling Pushy” by Sales Coach Dan Lok: Stay calm and confident when facing resistance.

“Supporting Someone Who Is Grieving” by Megan Devine (Refuge in Grief): How to be present with grief without trying to fix it.

“The Power of Listening” by William Ury (TEDx Talk): Learn why deep listening is your most powerful tool.

Articles

Harvard Business Review — **“What Great Listeners Actually Do”**: Go beyond silence to build connection through active listening.