

Your Journey Forward Aftercare Path:

For Funeral Directors

You make the first connection, opening the door to ongoing support.

It Starts with You:

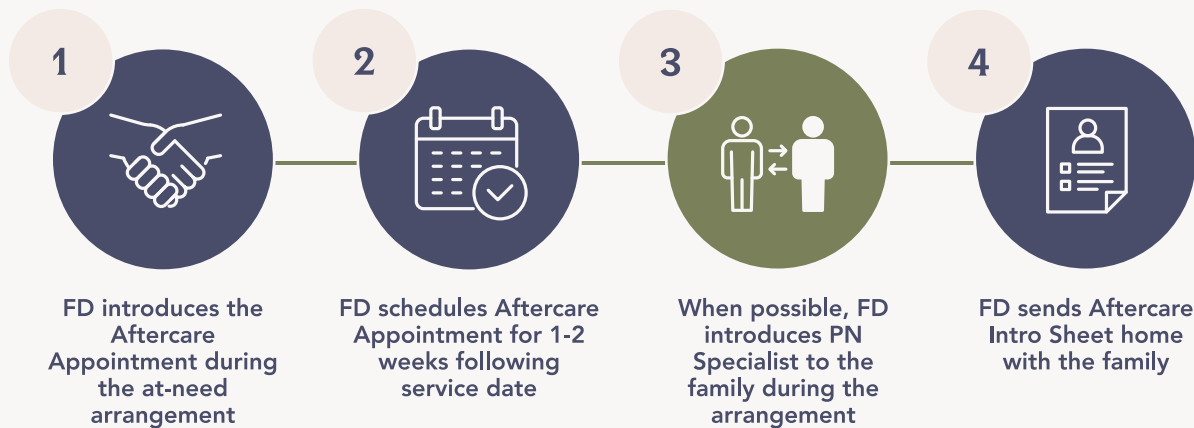
You are the first to introduce the extension of care *after* the service.
How you introduce aftercare shapes whether families engage.

Why Schedule the Aftercare Appointment at the At-Need Arrangement?

In the midst of emotional overwhelm and logistical decisions, scheduling a follow-up before the family leaves provides structure and support. By framing the arrangement as *the first of two meetings*, it helps set expectations — reassuring the family that your care continues beyond the service.

Setting the Stage:

Introducing Aftercare: The Funeral Director's Role



Best Practices

- Schedule the appointment before the family leaves — ideally 1-2 weeks after the service.
- Use natural language to introduce it as part of your continued care.
- Include the *Aftercare Intro Sheet* in the take-home folder.
- Add aftercare scheduling to your checklist to ensure it's consistently offered.

Try Saying:

The two-meeting framework:

"As we plan today, I want you to know this is just the first step. Before you leave, we'll schedule a follow-up — typically a week or two after the service — to check in, share resources and answer any questions you may have. We want you to feel supported every step of the way."

To schedule the follow-up:

"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 come up. Let's set that up now, just so it's on the calendar."

If the Preneed Specialist is available for an introduction:

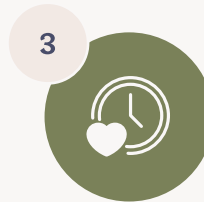
"I'd like to introduce you to [Tracy], who's part of our team and will be meeting with you for that follow-up meeting. She works closely with families after the service and will be a continued source of care and support for you all."

Note: Even if they meet the Preneed Specialist in person, still send the Aftercare Intro Sheet home with the family. It provides a quick overview and serves as an appointment reminder.

If Preneed Specialist is unavailable:

"You'll be meeting with [Tracy]. While she's with another family right now, I'd love to give you this Aftercare Intro Sheet. It includes a little more about what you'll cover in that meeting, along with a reminder for that time and date we just set. I'll tuck it into your folder so you have it."

Your Journey Forward Workflow



Step 1

Before the aftercare appointment:
Introduce Aftercare Concept + Schedule Aftercare Appointment during the At-Need Arrangement

Step 2

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

Step 3

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

Step 4

When appropriate:
Schedule a Preneed Appointment

Why It's Worth It

You set the tone. Families trust you in their hardest moments — and that trust doesn't end at the service. When you schedule the aftercare appointment, you create a natural next step that keeps families feeling supported. Without that thoughtful introduction, the process stalls. With it, you pave the way for continued care, preneed conversations and future growth.

Offering aftercare reflects the mark of a true professional — someone who delivers meaningful care at every touchpoint.