

SERVICE FOR:

FUNERAL
HOME:

FAMILY
VISITATION TIME:

VISITATION
DATE + TIME:

SERVICE PLACE
+ DATE + TIME:

☐ Casket: OPEN CLOSED

Exterior Color/Finish: Interior Color:

☐ Urn: Shape/Style:

Color/Finish: Dimensions:

ABOUT THE LOVED ONE:

Hobbies, likes/dislikes, what they will be wearing

PRODUCT NAME

Code

Notes

Script?

Price

PRODUCT NAME

Code

Notes

Script?

Price

PRODUCT NAME

Code

Notes

Script?

Price

PRODUCT NAME

Code

Notes

Script?

Price

PRODUCT NAME Code Notes Script? Price	PRODUCT NAME Code Notes Script? Price
PRODUCT NAME Code Notes Script? Price	PRODUCT NAME Code Notes Script? Price
CONTACT INFORMATION	
NAME	PHONE
ADDRESS, CITY, STATE, ZIP	
BILLING INFORMATION <div><input type="checkbox"/> <u>On File</u> <input type="checkbox"/> CC #:</div> <div>Expiration: CVV:</div>	
FUNERAL HOME INFORMATION	
NOTES	

FAMILY CONSULTATION SPACE SUGGESTIONS

Semi private area
Away from the day to day operations of the shop
Comfortable and calm surroundings
Easy to adjust seating / space to accommodate from one to numerous family members

AREA SHOULD INCLUDE

Sympathy Selection Guide / Book
Facial Tissue
Water / Coffee / Tea easily available
Consultation Worksheet & Pen
Small vase of fresh flowers

**WHEN YOU SEAT THE FAMILY, BE READY TO
GIVE THEM YOUR UNDIVIDED ATTENTION.**

notes:



CONSULTATION NUANCES ...AND STICKY SITUATIONS THAT MIGHT ARISE DURING THE CONSULTATION

Working with those who are grieving the loss of a loved one can be a challenge. Grief looks different for everyone, so it can sometimes be difficult to know what to say or how to act.

Common emotions with common attributes

1. **Very emotional**, hard time communicating - overcome with sadness

Crying or outbursts of sobbing (have facial tissue close by!)

In this case, the family is often indecisive / requires more guidance

2. **Accepting** - matter of fact - this is what it is and this is what we want

3. **Relief** - almost joyful. After a long illness or death of an older person. This is a celebration of life!

VERY IMPORTANT NOTE:

Don't share your grief story. We all have them. It's not about you, it's about them.

DIGGING DEEPER INTO THE 5 STEPS: LISTEN & GUIDE

1. What can you learn about the deceased?

- Favorite colors & flowers
- Hobbies? Gardening, hunting, fishing, bowling
- Children, grandchildren
- Activities, cards, golf etc.

2. What are they looking for?

- Traditional funeral, memorial service or
- Celebration of Life event
- Know your stuff!

3. Show your selection guide or book and guide them

- Make suggestions based on your professional experience
- Keep in mind inventory you have in the store or can get on short notice
- Suggest multiples
- Coordinating designs from other family members

4. Read the room!

- LEAVE them alone to look and talk amongst themselves
- Grab some flowers to show them if the conversation leads to this

5. Listen and repeat back and finalize

- "I heard you say..."
- Here are the details
- And the delivery time and instructions

6. Did they talk about payment or a budget?

- Are the flowers billed through the funeral home?
- Did they have a prepaid amount (& can they add to it?)
- Is cost a factor or do you have some freedom to personalize and make extra special?



TIPS FOR THE BEST OUTCOME FOR YOU AND THE FAMILY

KNOW your Sales Tool, your selection guide or book

- Be familiar with the layout
- Know design styles and color collections and where to find them
- Turn to specific pages after you hear the family needs

KNOW what's in your cooler

- Awareness of what you already have on hand is important
- Helps you suggest product you know is available

KNOW your flower market availability

- If the family is asking for something you know is not available, don't promise
- Set realistic expectation for the family
- Excuse yourself and call the wholesale during your consultation if necessary

KNOW your prices

- Tell them what is available in their price range
- Be realistic
- Set yourself up for success

notes:

Thanks for *attending!*



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