FINTRA LEAD FOLLOW-UP · FULLY WHITE-LABELED

They asked for your guide. Fintra takes it from there.

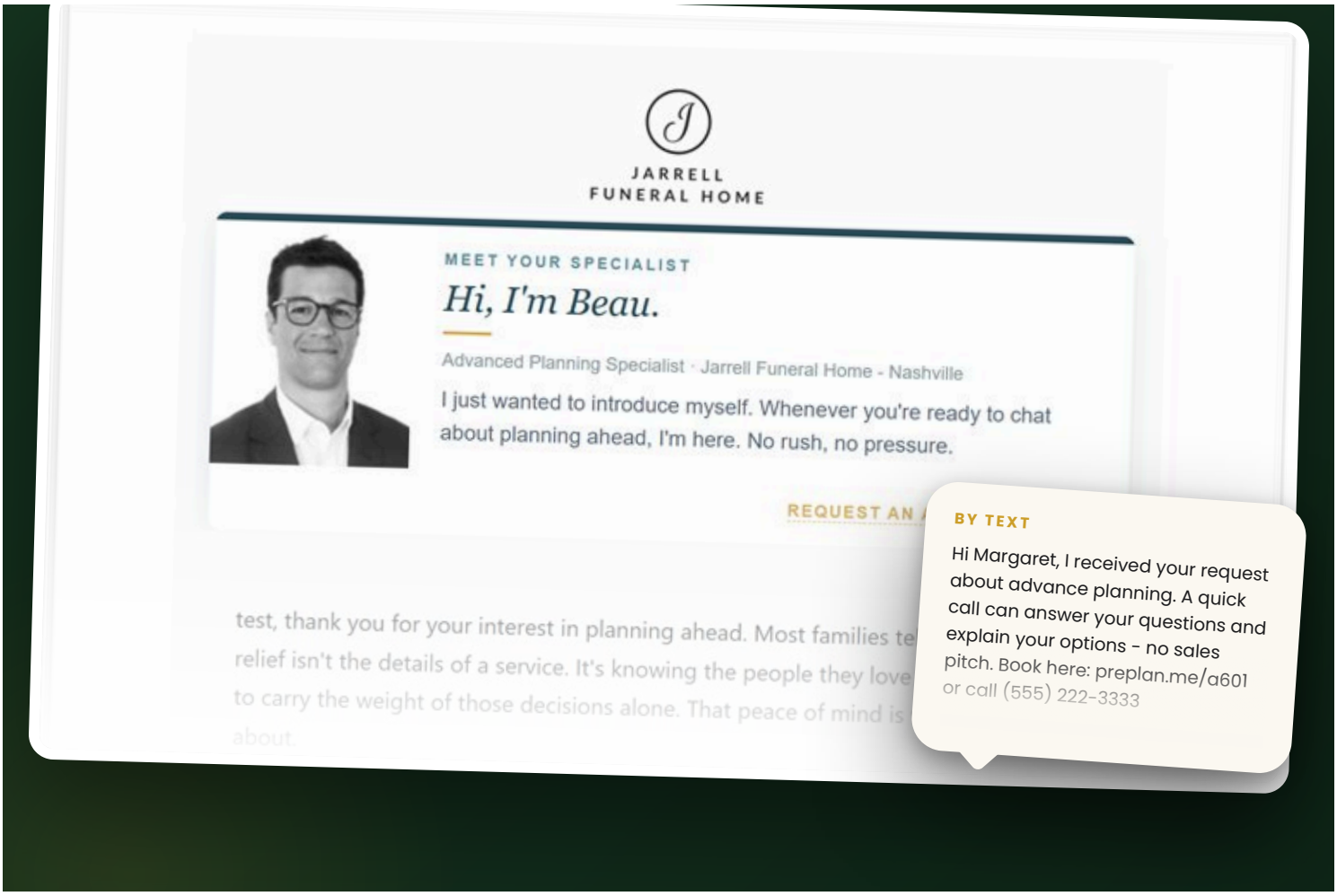
Everyone who requests planning information from you gets a real follow-up from your counselor, by email and text, in your funeral home's name.

👐 **Nothing for your team to manage**
It starts on its own the moment somebody requests information.

📈 **A third end up on the calendar**
35% of people who request your guide go on to request an appointment.

🔔 **Appointment requests reach your counselor**
By email, the moment they come in.

Email and text, **both in your name**



WHAT THE SERIES DOES

Deliver, help, then step back.

Somebody asked you for information about planning ahead. The series treats that as the start of a conversation rather than a lead to be worked.

01

Deliver, and introduce

The guide they asked for arrives straight away, with a short hello from your counselor. A follow-up makes sure it landed.

→

02

Help, then ask

What other families say, a short quiz so they can see where they stand, and a direct offer of ten minutes on the phone.

→

03

Answer the real question, then stop

Cost is what most people are weighing, so the series covers payment options plainly. Then it gives them something to keep and steps back.

35%

of people who request your guide go on to request an appointment.

That is what the follow-up is for. Without it, a guide download is a name on a list. With it, a third of them end up on your counselor's calendar.

BRANDED FOR YOU

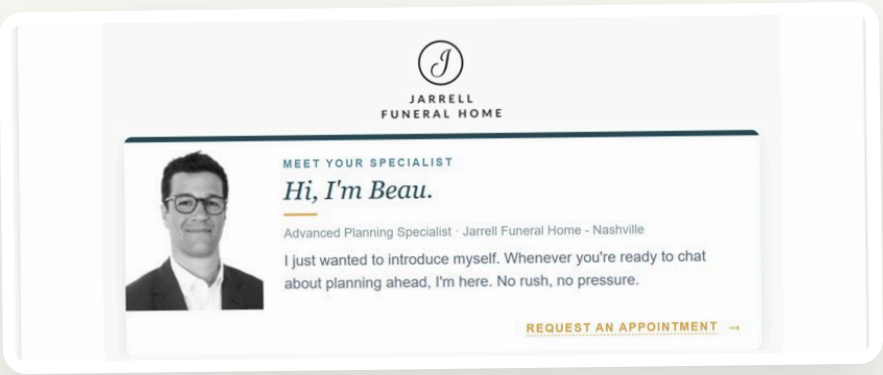
It looks like you, because it is.

Every message goes out under your funeral home's name, from your counselor, with your details throughout. Nothing is generic and nothing is shared.

> **Families never see Fintra.**

Replies come back to you. Appointment requests reach the counselor assigned to that family, by email,

the moment they arrive.



— YOUR LOGO AND YOUR COUNSELOR



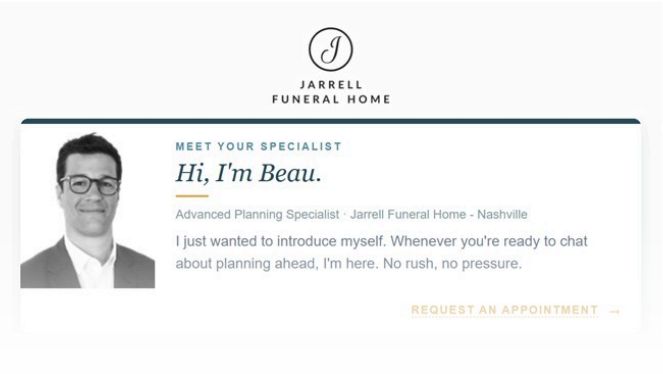
— YOUR ADDRESS, PHONE AND BOOKING LINK

See the whole email

WHAT LANDS IN THEIR INBOX

See the actual emails

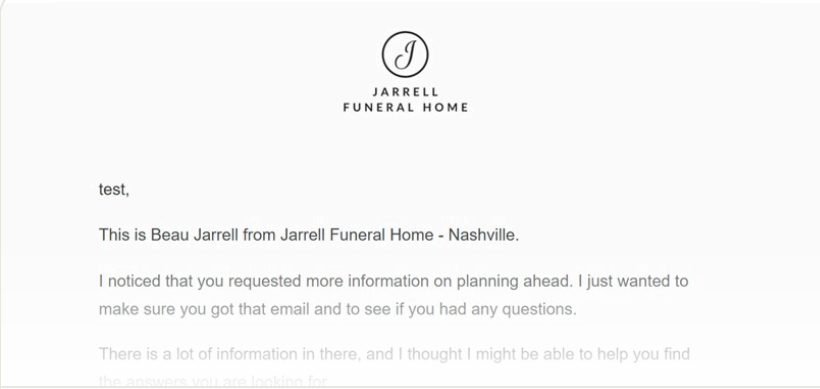
Three of the messages from the series, shown exactly as a family receives them. Tap any one to read the whole thing.



The guide, and an introduction

What they asked for, plus a short hello from your counselor and a second guide matched to what they were reading about.

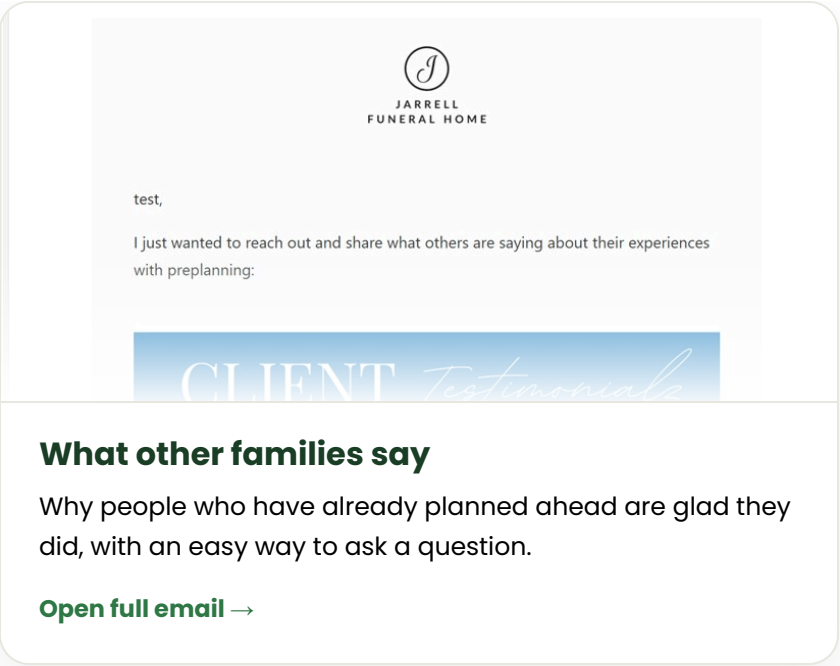
Open full email →



A check in

Making sure the guide arrived, and offering to answer anything it didn't cover. No new pitch, just the offer of help.

Open full email →



What other families say

Why people who have already planned ahead are glad they did, with an easy way to ask a question.

Open full email →

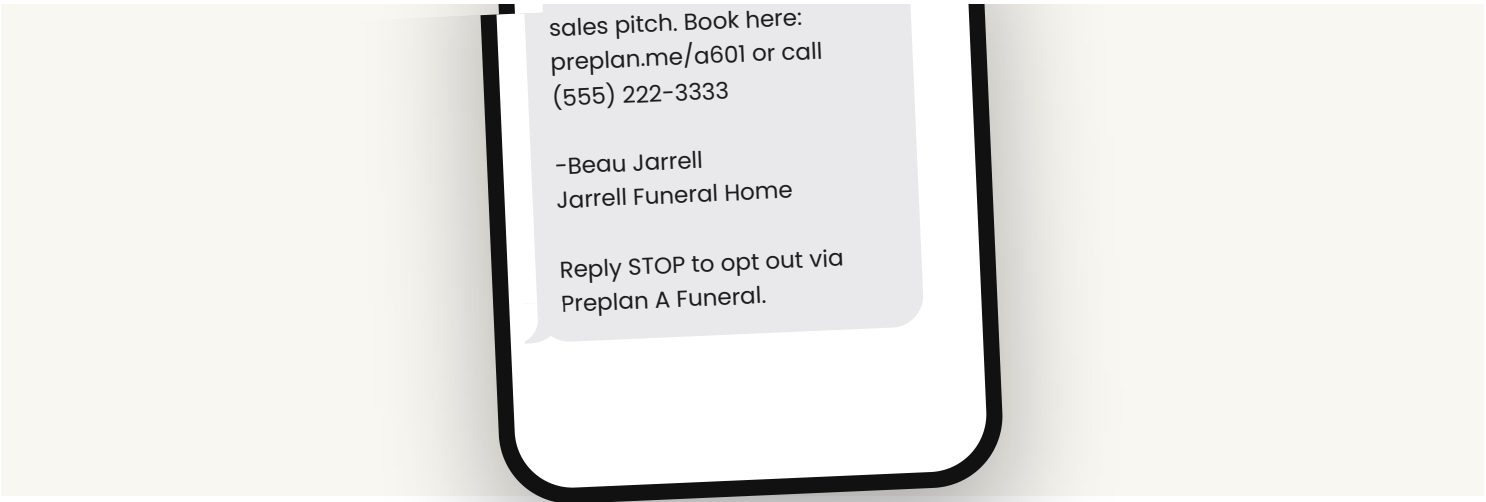
THE SECOND CHANNEL

And four short texts, for those who opted in.

Short, signed by the same counselor, and every one offers a conversation rather than making a pitch. Between them they cover what people actually ask about: whether a call is worth their time, what a plan costs and how it can be paid for, and a last note that steps back rather than presses.

- Opted in to texts only
- Daytime hours only
- STOP always works
- Sent on behalf of Preplan a Funeral



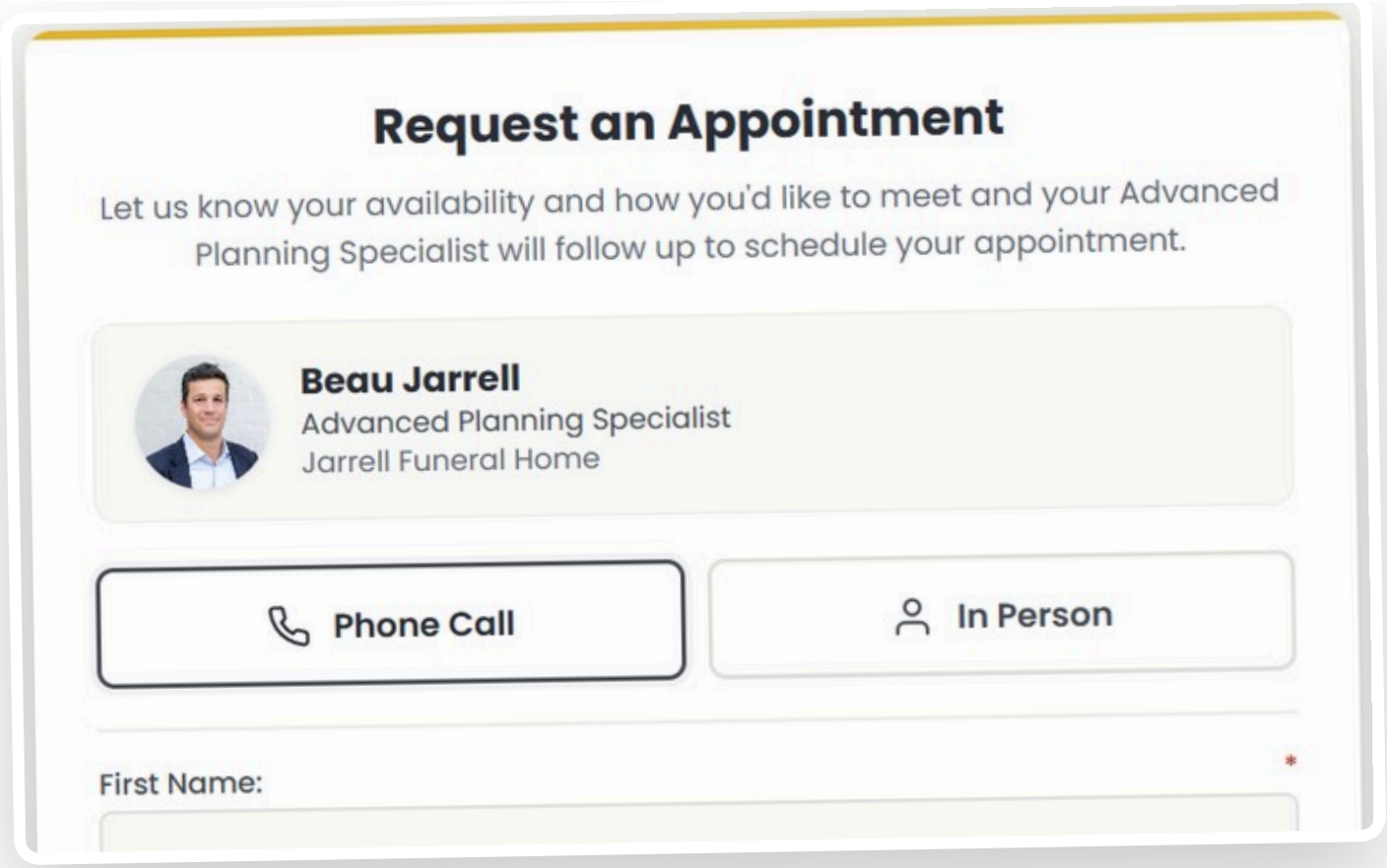


BUILT-IN SAFEGUARDS

How it stops.

With lead follow-up the worry is never that it's too gentle. It's that something relentless goes out under your name for months. So here is every way this series ends.

- ✓ **The moment they respond.** Request an appointment or ask to talk and the series stops. Nobody who has raised their hand keeps receiving follow-up.
- ✓ **After 26 days, regardless.** No indefinite drip. It ends by backing off rather than escalating.
- ✓ **Texts only with consent.** Only people who opted in receive one, and only on a real mobile. Landlines are detected and skipped.
- ✓ **STOP always works.** Reply STOP to any text and the texts end immediately.
- ✓ **Daytime hours only.** Every text is held to a daytime window, so nothing arrives at night.
- ✓ **Unsubscribe on every email.** One click, honored straight away.



Your counselor takes it from here.

IN THE HUB

What you'll see

Two places: your Fintra hub, and your counselor's inbox the moment somebody raises their hand.

- ✓ **Enrollments.** How many people are in the series, how many are active, how many opted out.
- ✓ **Where your leads come from.** Your landing pages alongside your other sources.
- ✓ **Your pipeline.** Every lead by status, from new through nurturing, funded and dormant.
- ✓ **Appointment requests.** The people who asked to talk.
- ✓ **By location and by counselor.** For firms with more than one of either.

✓ **Growth over time.** Leads created week over week and month over month.

What you actually do. Nothing, once it's on. Somebody requests information from one of your landing pages or campaigns and the series begins on its own. No lists to build, no content to write, no sends to schedule. Your counselor answers the phone when somebody asks for a meeting.

A program, not a mail-merge.

Fintra manages this as a single program, not a set of templates handed over and left alone. Content and timing are refined continuously against real engagement across every funeral home in the program.

Where the line sits

The division of responsibility is clear, so it is better stated plainly than left implied.

YOURS TO APPROVE

- Whether you're enrolled, and in which configuration
- Your counselor's name, photo and contact details
- Your brand and firm details
- The tone standards and the safeguards above
- How direct the series is allowed to be

RUN BY FINTRA

- The wording of each message
- Sequencing and timing inside the published shape
- Ongoing refinement against engagement data
- Which variations run, and when

> **Anything that would change the series' structure, or how hard it asks, comes to you before it moves.**

Fintra is often asked for the full library of messages and doesn't circulate it. That is less about protecting the writing than protecting your results: this copy is tuned against what works across dozens of funeral homes, and when it gets rewritten locally the changes feel right while the numbers quietly get worse.

See it in action.

gofintra.com

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