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Improved Sales Effectiveness & Efficiencies



GERRY HEARD
Vice President
Sales

Improved marketing approach igniting higher sales effectiveness...



CUSTOMERS

Marketing data analysis improves targeted customer prospects

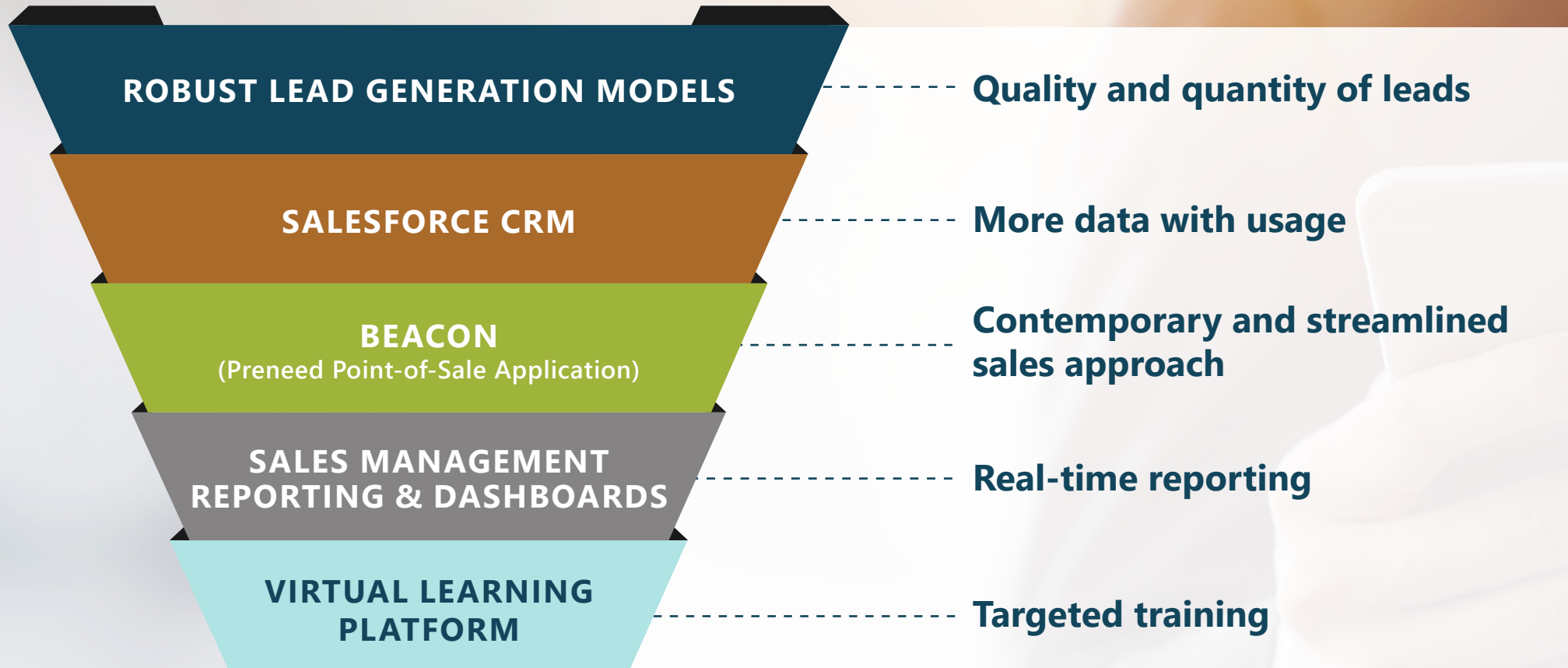


COUNSELORS

Sales customer relationship management systems improve matching prospects with expert counselors

...which is driving higher efficiencies and effectiveness to improve our production capabilities

Technology is foundational for continued and efficient sales production growth



Increased usage of our CRM during COVID accelerated growth

SALESFORCE AND SALES MANAGEMENT



BEFORE

- “Rolodex” or relationship sales approach
- Honor system used for following up on leads
- No visibility into how leads were allocated
- Difficulties in stratification of data tranches and manual reporting limited timeliness and quality of reporting

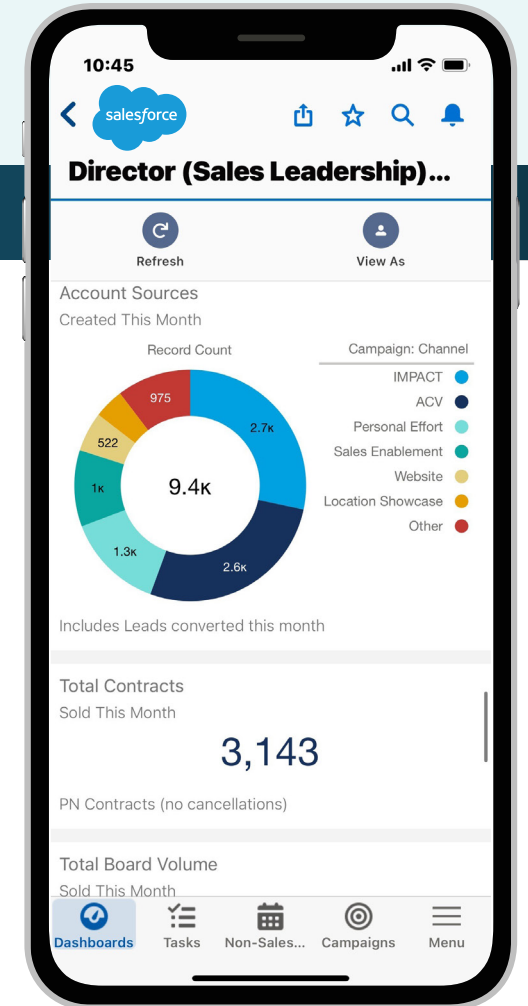
PUSH REPORTING | 30+ DAYS
Sales Leadership Travel Time ~75%



NOW

- Higher lead quality and quantity provides competitive advantage, reduces turnover
- No counselor protection of unworked leads
- Counselor metrics explain lead assignment
- Automated activity and performance insights allow quick pivoting for forecasting, incentives, lead management and training

PULL REPORTING | Immediate Data
Sales Leadership Travel Time ~25%



65% reduction in cost to train



SALES COUNSELOR TRAINING



BEFORE

- Physical sales schools and in-person visits from sales leadership team for training
- Training took counselors out of the market, reducing selling opportunities
- Due to costs associated with travel, counselors may delay or forego training



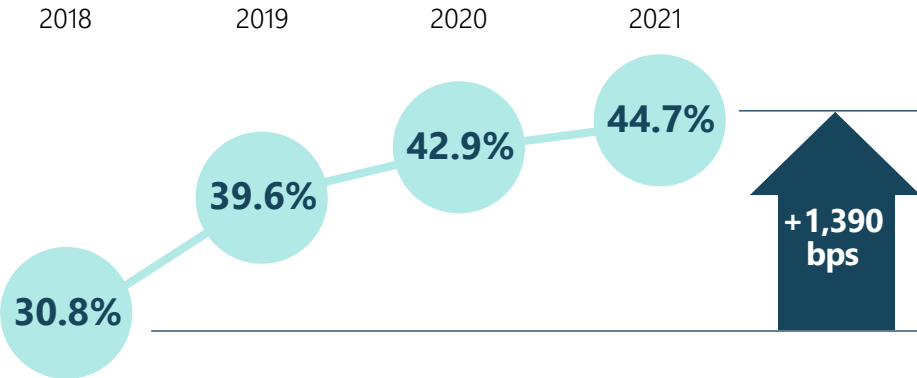
NOW

- Training from sales school and sales leadership held virtually and scheduled so counselor can spend half day at training and other half being productive
- Lower travel costs generate cost savings
- Flexibility encourages more timely and targeted training

Improvements resulted in higher close rates and higher sales with fewer counselors

CORE CLOSE RATES ON ALL LEADS

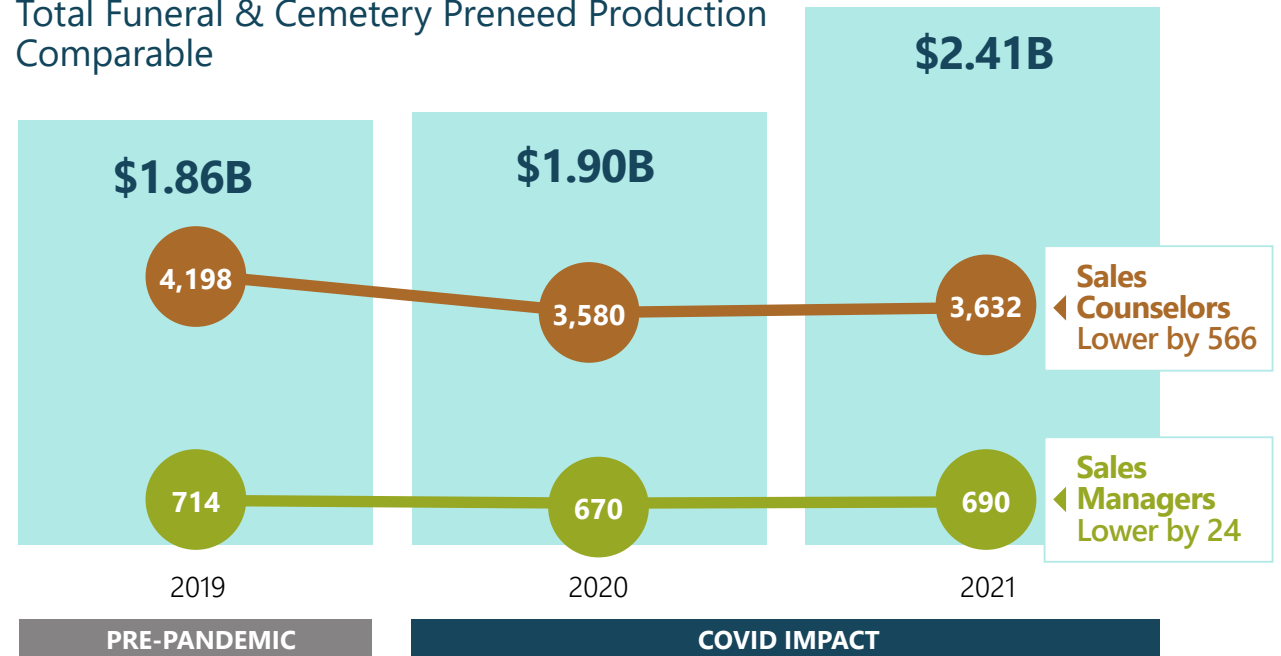
Appointments to Sale



Close rates represent the percentage of appointments kept that resulted in a sale

FEWER, BUT MORE EFFECTIVE SALES COUNSELORS SUPPORTED BY TECHNOLOGY

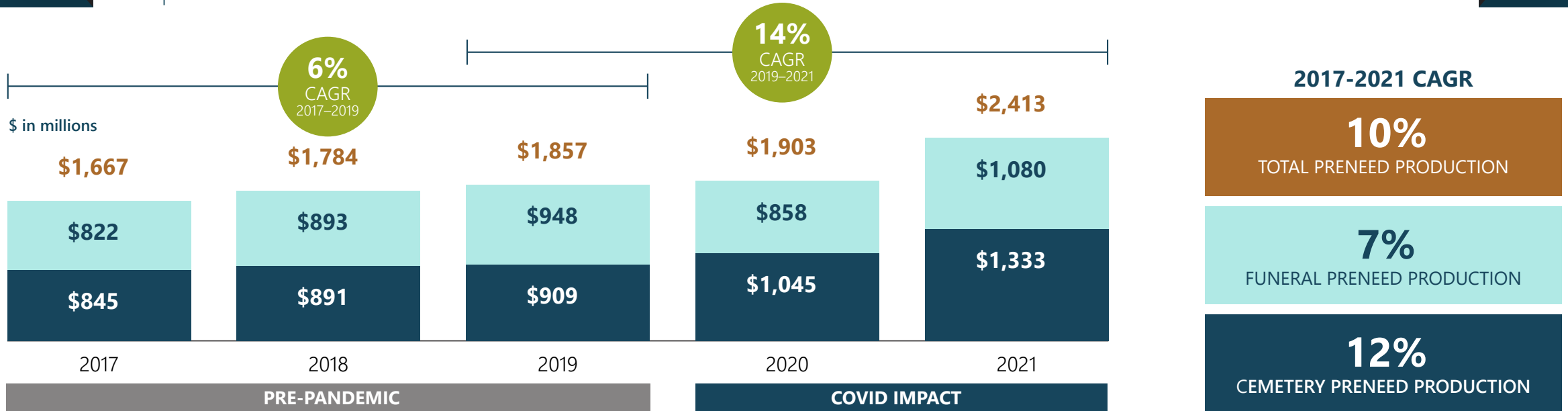
Total Funeral & Cemetery Preneed Production Comparable



Expecting continued growth off a higher base post-COVID

TOTAL CEMETERY & FUNERAL PRENEED SALES PRODUCTION

Comparable



Beyond 2022, our base case expects a combined funeral and cemetery preneed annual growth rate in the mid single-digit % range on a new elevated base; however, with more effective lead generation and sales management we see potential for higher growth