

Sales during COVID-19: How to Remain in Compliance

Over the coming installments of this segment, I will be sharing some best practices to implement in the new normal. This installment will give you the direction you need to engage in sales, both at need and preneed, from a distance, via the internet, e-mail or telephone and remain compliant with relevant laws and rules.

Sales processes have become more complicated now that funeral directors are not sitting across from customers at arrangement room tables as frequently. Of course, now that some states have opened its economy to some degree, those in-person arrangements are happening more often, but there are those who do prefer to interact in another environment. Those people may remain in that mindset for months to come, so alternative selling mechanisms must be embraced. A “distance” sale should be conducted with the following in mind.



First, make sure that you have given the customer access to your GPL and other price lists as necessary. If you are conducting business online then your customer should be able to view and download your GPL from your website. I strongly recommend that you require that the purchaser acknowledge viewing and receipt of the price lists before the checkout process occurs. And, if conducting a sale via e-mail, you can ask that when the customer returns the signed contract, they acknowledge receipt of the GPLs. Though the FTC Funeral Rule does not mandate that you do so, it is the right thing to do and will go against any claim that the consumer was misled.

Second, ensure that you and your staff who interact with customers in writing, via e-mail or text, do so in a professional, thoughtful way that you are proud of. If I had a dollar for every licensee complaint I have responded to because the funeral director or preneed sales agent was not careful in the words or tone used in an e-mail, well ... it's not something you may have thought of, but a quick session with your staff about consistency, courtesy and even grammar and punctuation is a good idea.

Third and finally, capture the signature electronically and send a copy of the fully executed contract to the consumer. It's the law.

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Remember, from a distance is the new way. The quicker you are to adopt practices to make your customers' experiences consistent and positive, the less likely you are to be the recipient of a consumer complaint.

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