KEEP BY EVERY PHONE

The First Call: Script and Checklist

EverlyPro

For everyone who answers the phone, day or night. Not a word-for-word script: a prompt so nothing is missed.

THE SCRIPT

ANSWER	"Good evening, [firm name], this is [your name]." Slowly. Never just "Hello?"
LISTEN	"I'm so sorry. Can I take your name, and the name of the person who has died?" Use both names from here on.
REASSURE	"You don't need to decide anything tonight. I just need a few details so we can look after [name]."
ASK	The essentials on the sheet below. Nothing about costs, dates or choices.
NEXT STEPS	"Our team will be with you at about [time]. They'll ring when they're on their way."
CLOSE	"I'll call you tomorrow at [time] to arrange a time to meet. You can ring this number at any hour."

FIRST-CALL SHEET

Taken by _____ Date _____ Time _____

Caller
Name, relationship, best number

Person who has died
Full name, and what they were known as

Where they are now
Address or ward, access notes

Death confirmed?
By a doctor, nurse or paramedic: who?

Expected? ☐ Yes ☐ No ☐ Police or coroner involved

Faith or cultural customs
Especially around timing

Jewellery or personal items
Any wishes

Time with them first? ☐ Yes ☐ No

Arrival time given

Next call
When, and who

BEFORE YOU HANG UP, THEY'VE HEARD

- ☐ Your name, and that you'll look after them
- ☐ When your team will arrive
- ☐ That nothing needs deciding tonight
- ☐ When you'll call next, and who
- ☐ That they can ring at any hour

CAN WAIT FOR THE ARRANGEMENT MEETING

- Burial or cremation, dates and venues
- Budget, costs and funeral plan details
- Music, readings, flowers and notices
- Paperwork and registration

Written for UK funeral homes. In Ireland, and often in Northern Ireland, much more is usually settled on this call.

Full guide: **everlypro.com/blog/first-call-funeral-directors**

Free to copy and share.