

# Client intake and family consultation management

This workflow automates the client intake process from initial contact through family consultation scheduling, ensuring compassionate communication and proper documentation of funeral arrangements. It streamlines administrative tasks while maintaining personalized care standards during sensitive family interactions.

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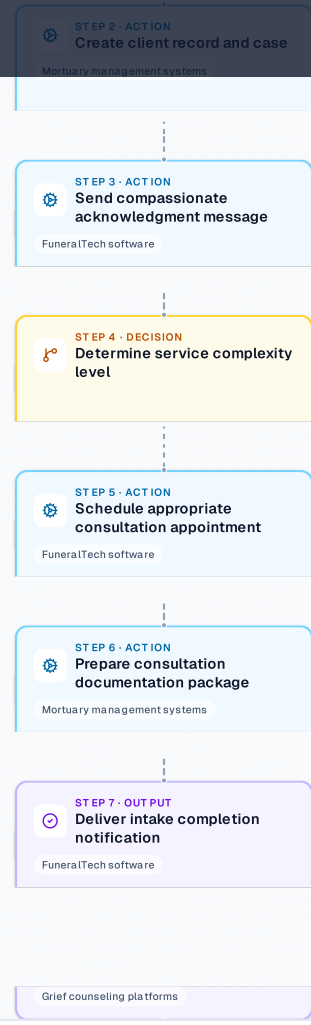
## WORKFLOW TRIGGER

Family member contacts funeral home requesting services for deceased loved one

## Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.





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## Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

⚡ TRIGGER

### Receive family service inquiry

System detects incoming call, email, or web form submission from family requesting funeral services. Initial contact information and basic details

about the deceased are captured automatically.

## AI Business OS

FuneralTech software

2

 ACTION

### Create client record and case

New family record is established in the mortuary management system with initial intake information. A unique case number is generated and preliminary documentation folders are created.

Mortuary management systems

FuneralTech software

3

 ACTION

### Send compassionate acknowledgment message

Automated but personalized condolence message is sent to the family acknowledging their loss. Message includes next steps information and funeral director contact details.

FuneralTech software

Grief counseling platforms

4

 DECISION

### Determine service complexity level

System evaluates initial request details to classify as standard burial, cremation, memorial service, or complex arrangement requiring specialized consultation. Routing is determined based on service type and family preferences.

Mortuary management systems

5

 ACTION

## AI Business OS

### Schedule appropriate consultation appointment

Family consultation is automatically scheduled with available funeral director based on service complexity and urgency. Calendar invitations and preparation materials are sent to both family and staff.

FuneralTech software

Mortuary management systems

6

 ACTION

### Prepare consultation documentation package

Pre-consultation materials are generated including service options, pricing guides, and required legal forms. Staff receives briefing materials about the family's initial preferences and special considerations.

Mortuary management systems

Funeral home accounting systems

7

 OUT PUT

### Deliver intake completion notification

System confirms successful client onboarding and consultation scheduling to family and staff. All stakeholders receive appropriate documentation and next steps confirmation with timeline expectations.

FuneralTech software

Grief counseling platforms



## Outputs

## AI Business OS

- Completed client record with case number
- Scheduled family consultation appointment
- Pre-consultation documentation package
- Staff preparation briefing materials



### Key Metrics

- Average intake completion time
- Family satisfaction scores during initial contact
- Consultation scheduling efficiency rate



### Tools & Integrations

- FuneralTech software
- Mortuary management systems
- Grief counseling platforms
- Funeral home accounting systems

## AI Business OS

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