

# Roundtable

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## Technology Roundtable

**In today's world, the question is no longer "Should I invest in technology?" but "What technology do I need to run my business better?" Technology is an essential and powerful tool for doing business effectively and efficiently. Zachary Garbow, co-founder of Funeral Innovations, and W.H. "Bill" Williams, president and CEO of Funeral Services Inc., talk about the power of technology, how a firm can assess its technology needs and what the future holds.**

**In general, do funeral professionals understand the power technology offers to help them run their businesses better?**

**Garbow:** Funeral directors are becoming much more knowledgeable about the impact of technology on their business. Our industry typically lags behind others in terms of technology adoption, but, with the market changes including rising cremation rates, funeral directors are being forced to become more progressive if they want to grow their businesses. Sitting on the status quo is no longer sufficient and, in fact, will now result in a slow decline in their business.

Technology is devouring every

industry. Some people might feel like that's a scary statement, but it's actually a promising reality. Technology allows funeral directors to do more for less. For example, using social media you can reach more people in your community for less money to increase brand awareness and education. With email marketing, you can automate your lead nurturing, ensuring the families you serve and even potential customers get the right message from you at the right time. An effective online obituary system helps you gain more customers and increase revenue from every person who visits your website, even while you sleep.

In the coming years, we'll continue to see a bifurcation of this industry: As the progressive firms adopt and employ technology, their companies will continue to grow at the expense of those who don't.

**Williams:** When I first came to FSI in 2001, few of our clients had computers. Today, computers are almost mandatory for a successful business. Technology is more essential than ever, from electronic banking to posting online obituaries, managing a firm's Web and social media presence, not to mention easy-to-use accounting software.

That being said, it is difficult to grasp how technology can positively impact a business and even more difficult to efficiently integrate technology into day-to-day business operations. Often, the challenge seems insurmountable and may require funeral professionals to revisit their business operations. If a funeral professional can lead his or her firm over this hump, the fog fades away and understanding how technology may advance the firm becomes more clear.

## How can technology help businesses run more efficiently and effectively?

**Garbow:** Technology is best employed in a way that makes difficult, time-consuming tasks easy or automatic. In the case of funeral homes, you can use email and social media marketing to effectively reach your community with your message day after day in a way that helps educate them and prompt them to take action. In the past, you've had to pay expensive marketing consultants to run print ads and send paper mailings, but technology makes your marketing more effective, engaging and even automatic.

In the case of your website, technology can improve the experience for your visitors and help convert them from passive observers into active leads. Here are three examples:

- Having a responsive website means that the website's design adapts to the size of the visitor's screen. With over 50 percent of your visitors now coming from a mobile device, you can use technology to customize the experience for these mobile visitors and help ensure they find what they are looking for with minimal scrolling, typing or clicks.

- By deploying a shopping cart in your obituaries, you can allow visitors to purchase flowers and other gifts for the decedent's family. This helps the visitor feel involved, it helps the family easily receive the gifts, and it helps the funeral home make more revenue from every website visitor.

- To take it further, we deploy "goal-oriented obituaries" for our firms that provide hooks for website visitors to engage with the obituaries in ways not seen before, and even enter the funeral home's marketing funnel. This has proved extremely effective, with some firms getting up to a dozen or more newsletter subscribers opting in each day.

**Williams:** In the last several years, our industry has seen how implementing technology can drastically and positively impact business operations. Electronic death certificates are a great example. Years ago, funeral directors would type a death

certificate, drive it to the doctor's office and return a few days later to collect the signed paperwork, then drive it to the local health department for filing and return a few days later for certified copies. In many states today, we file death certificates electronically, eliminating much of this time and expense, improving the efficiency of the process.

Additionally, technology can also help businesses cut costs and increase profitability. When utilized correctly, technology can help businesses save on administrative costs. It also has the ability to minimize errors, and improve the accuracy and quality of work product. When quality and efficiency improve, there's always an opportunity to increase profitability.

## How can partnerships enhance access to technology?

**Garbow:** With technology, you can't do it all yourself. It's important to find partners you can trust who are knowledgeable of the latest trends and can accurately assess how they can be utilized in our industry. At Funeral Innovations, we like to define the difference between a provider and partner. A technology provider can get the ball rolling for you, but ultimately they are working "for" you, not "with" you. A technology partner, on the other hand, acutely understands your firm's needs and will work with you side by side to ensure the technology is meeting your funeral home's business goals.

You should really be seeking a technology partner rather than provider, since you want someone you can trust to be on your side and always looking out for your best interests, even as technology continues to change.

**Williams:** Partnerships among service providers and suppliers can benefit funeral professionals in several ways. These partnerships can enhance access to new technology and help firms use existing technology in a more cost-effective manner.

For example, FSI recently partnered with a leading cemetery

management software company, CemSites. Through this partnership, our clients have access to CemSites' cemetery customer relationship management software. With the partnership between CemSites and FSI, clients of both companies have access to seamless and innovative software to manage every aspect of a cemetery in one place. CemSites is one of several companies we have partnered with to provide our clients with enhanced access to technology.

## What steps can a firm take to assess its technology needs?

**Garbow:** First it's important to honestly appraise your existing website and digital marketing to ask yourself the following questions:

- For your website, do you have a responsive design, which looks great on mobile devices? Is your website optimized for SEO, meaning folks who search for funeral services in your area are able to easily find your site? Are your obituaries static billboards for the deceased, or do they offer revenue-generating opportunities such as flower sales, and do they generate new leads through interaction and newsletter signups?

- Are you utilizing Facebook to reach your community with your message and educate folks on the value of your services? Are you effectively growing your presence and reach on Facebook and generating engagement with people in your community?

- Are you using email marketing, which is considered by many to be the most effective form of digital marketing? Are you utilizing email to generate leads, promote your local events and educate your audience?

The sooner you can start improving your website and digital marketing strategy, the better positioned your firm will be for lasting success.

**Williams:** First, understand that assessing technology needs is a multi-faceted and continual process. Next, to better understand your firm's needs and how technology can address these areas, gather your internal team and establish priorities.

Then, investigate ways in which other firms are successfully using technology. Talk with others in the industry about their successes, failures and challenges implementing technology. After gathering this information, reprioritize and determine what technology will help your company meet its goals.

**How often should a firm assess its needs? Every year? Every five years?**

**Garbow:** As often as possible! Several times a year, at least. The beauty of technology is that the results can be measured in real time, so you can constantly analyze where your strategy is successful and where there is room for improvement. For our clients, we provide a dashboard summarizing their results in real time. That way they can always see how their website and digital marketing is performing on a daily, weekly and monthly basis. We also hold quarterly reviews with them in person or over the phone to discuss their results “face to face” and continuously realign our strategy with their goals.

Technology moves fast. If you only stop to assess your strategy and

needs once a year, you’ll already have fallen behind.

**Williams:** Technology changes daily. While firms cannot change technology daily, business owners should continually assess and work to improve their business processes. An openness to make adjustments and tweaks to technology can improve business operations and the user experience, ultimately improving profitability. This may be a simple tweak in a program or a complete overhaul of the technology in place.

**Can you talk a little bit about the importance of product development when it comes to meeting the needs of today’s funeral professionals?**

**Garbow:** Our industry is quite unique in its software needs. Funeral directors are extremely busy serving their families, and as such, the software products they utilize must be exceptionally easy to use. We’ve found that existing software utilized in other industries doesn’t fit the needs of funeral directors.

When we develop our software products, such as our Social Media Copilot and Email Copilot, we design and develop them hand in

hand with funeral directors’ input. We’ve discovered that the best software for funeral directors are tools that are simple to use (to the point of being automatic), turnkey (requiring minimal to no setup and configuration), and clearly illustrate their performance and results (through dashboards and reports).

**Williams:** Technological platforms should be intuitive and easy to operate. This is paramount to meeting the demands of today’s funeral professionals. When developing software and new products, companies must consider the environment and the demands of the end user.

**What is the next technology frontier as it relates to funeral service?**

**Garbow:** Facebook continues to gain steam and importance as a way for funeral homes to educate and engage their audience. While most firms now have a Facebook page, the path to sustained social media success requires using Facebook Ads as a way to target very specific groups of people with a distinct message that resonates with them.

Further, we are seeing email marketing as a way for funeral homes to spread their message, nurture leads and create a more effective sales funnel. Email marketing can be as simple as sending a monthly newsletter with educational articles and local events. Email marketing has worked effectively in literally every industry it’s used in, and funeral homes are just now starting to become aware of its value.

**Williams:** There are numerous opportunities for technological advancements, particularly in how we implement technology within our industry. Other sectors, such as consumer goods, entertainment and even financial industries, are ahead of the funeral industry when it comes to addressing the needs of millennials. For the death-care industry, there is an opportunity for technology to help identify and address this generation’s funeral planning needs. •

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