

# Preview

By Thomas A. Parmalee

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## FUNERAL SERVICE BUSINESS PLAN

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### NASHVILLE, TENN

## Technology, Service, Due Diligence and More

### Best Practices to Take Center Stage at Business Plan Conference

The Funeral Service Business Plan Conference has built a reputation as one of the funeral profession's most intimate and worthwhile events ... and not even a pandemic can stop it.

This year, the event comes to Nashville, Tennessee, Dec. 3-4 on the heels of the Cremation Strategies Conference at the Renaissance Nashville Hotel.

"The smaller nature of this event allows us to move forward despite COVID-19," said Allison Sullivan, the longtime publisher of Kates-Boylston Publications. "We heard from so many people who urged us to hold the conference, and we decided that with some adjustments, we'd be able to provide this valuable educational and networking opportunity for all the

funeral professionals who want to reconnect and move forward."

Those "adjustments" will mean hand sanitizer stations and spread out seating. Masks won't just be welcome but encouraged.

The event is sponsored by Implant Recycling, Precoa, Ring Ring Marketing, Funeral Services Inc. and Express Funeral Funding and will be held in the heart of Music City.

"If you haven't been a part of this event before, you've missed out on an incredible learning opportunity," said Mark Jorgensen, president and owner of Global Recruiters of Cincinnati. "Certainly, the presentations are topically diverse and insightful. But as is so often the case, much of the 'value added' is the

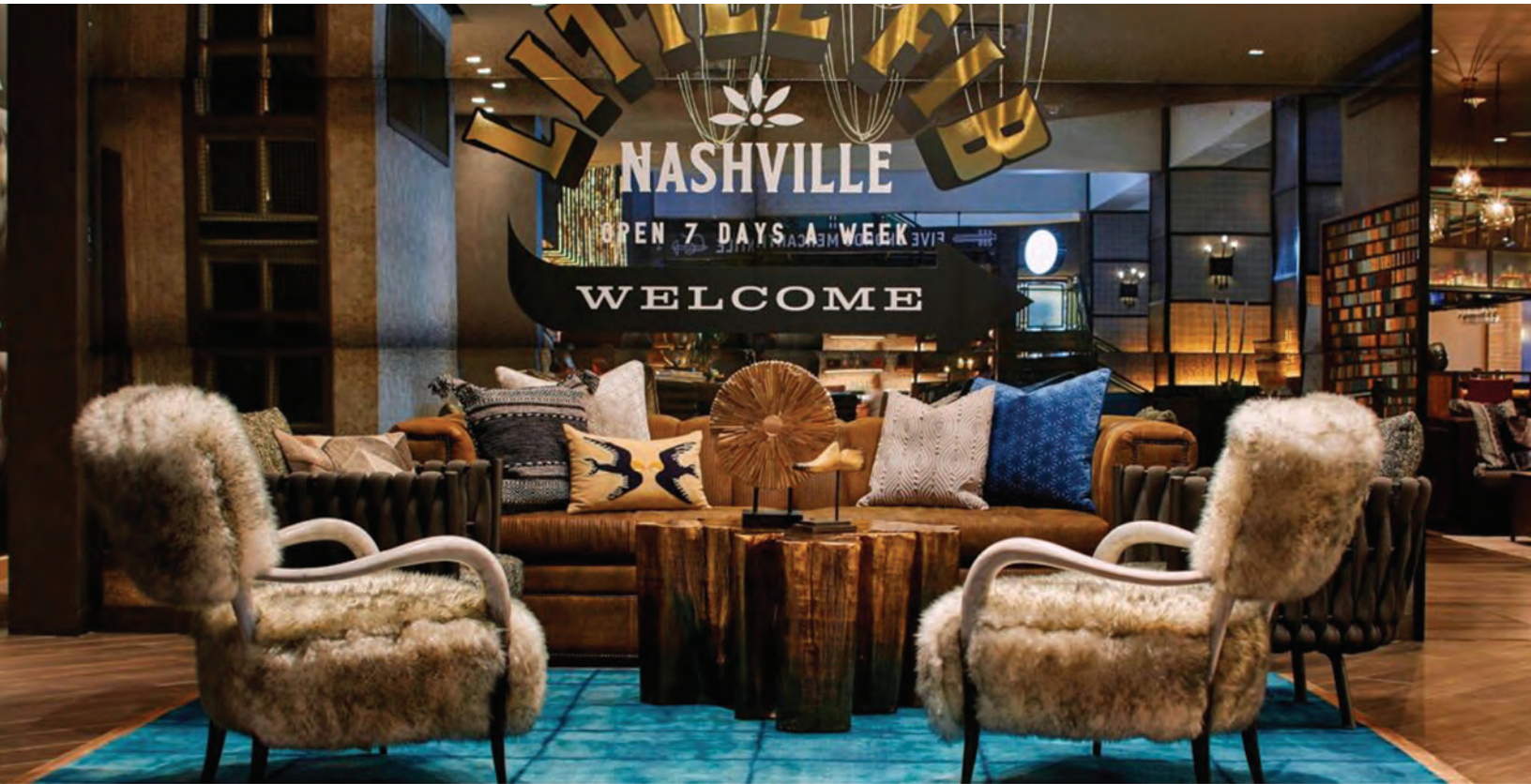
interaction with so many progressive owners from around the country, as they interact during the sessions, and less formally, before and after each day's program."

#### Building the Best Team

Jorgensen will kick the conference off with a talk titled "Building and Retaining Your Team: The Right Hire Is Only the Start."

"Not surprisingly, demand for our recruiting and search work in 2020, before and during the pandemic, has remained high and the supply of quality talent remains low," Jorgensen said. "Many are exiting the profession annually, putting even more pressure on an already short supply."

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## December 3-4 • Renaissance Nashville Hotel

Jorgensen hopes that the pandemic will stimulate more dialogue within the profession and – in terms of staffing – shift the focus to what really matters. “In some states, one can be a funeral director only; in others an arranger only,” he observed. “Many of these people enter funeral service from other caregiving professions – health care, education or ministry. They’ll never embalm, but they’ll be ideal for meeting and serving your families at their times of greatest need. Alternate and additional licensing options are worth exploring.”

Asked about the biggest mistake he sees firms make when hiring, Jorgensen said, “Don’t become infatuated with any candidate during the first conversation or interview.” He explained, “I hear stories of experienced directors (and even apprentices)

interviewing and being offered a job on the spot. Career changes are among our biggest life decisions and hiring decisions are among an owner’s most consequential. So that instant decision to hire may mean employment as enduring as some surprise weekend marriages at Las Vegas wedding chapels.”



Mark Jorgensen

As to the most common *firing* mistake, Jorgensen said too many firms make the move without ever communicating performance concerns – verbally, in writing, and before the termination occurs. “If no objective standards of performance were established during hiring and onboarding, your employee may believe all is well and be unaware of specific performance deficiencies that rise to a level warranting that end of employment conversation,” he said.

### The Truth

Dan Isard, managing partner of The Foresight Companies, will deliver a talk titled “The Truth about Selling and Buying a Business.”

The number one error in this area is a “do it myself” mentality, Isard said. “People think they can do it themselves because maybe they did it



Dan Isard

that way when they bought the business,” he said. “Or maybe it is a frugality, saving the fees of the broker. I get both arguments. However, they focus on the completion of the act – not the process of the act.”

For example, if you want to close a deal but don’t know a firm’s true value and fail to take steps to get the best financing and best terms, then you may still close the deal – but at a great cost, Isard said. “A good broker for a buyer or seller does the exact same thing, except from a different perspective depending upon their client,” he said.

During his years advising clients, Isard has seen it all. “I have represented sellers where the buyer represented themselves,” he said. “Their lawyer produced a purchase document that omitted many key components. In one case, the lawyer had no reference to preneed. The word or concept was not mentioned. Here they were buying a business with almost \$10 million in preneed accounts and their lawyer omitted the entire concept! The client could have absconded with the money and the buyer would have had no recourse.”

Isard has also represented buyers where the seller heard at a conference that “funeral homes sell for between six to eight times revenue” – a statement that astounded him. “No, they sell for a multiple of earnings before interest, taxes, depreciation and amortization,” he said. “This guy thought his \$500,000 revenue business was worth between \$3 million and \$4 million.”

Another big mistake is a “trust the

buyer” mentality,” Isard said. “The acquisition companies are filled with great people,” Isard said. “These corporate development people and the seller will have many friends in common. So, the seller will speak to one buyer at a time. They will trust they will give them the highest value as they are their friend. These trusting souls do not understand, ‘buy low, sell high.’”

As to how the coronavirus has changed the transition of firms, relationships are no longer as effective as they used to be, he said. “We used to begin this relationship (or enhance it if they knew each other) with a dinner as part of the process. Now we are ‘Zooming.’ We can’t get on planes as easily or effectively as a few months ago. In some cases, the closings have been adversely affected as some court-houses that hold or register deeds are not open or have limitations on outsiders coming in. They may also be short staffed. So, there are obstacles but not impediments.”



Welton Hong

### Leveraging the Internet

Returning to the program by popular demand is secret seven-figure weapon Welton Hong, the founder of Ring Ring Marketing, who said most of his clients have heeded his advice to tweak how they’re communicating with families amid the COVID-19 pandemic.

That has meant including a pop-up on their websites to let visitors know they are open for business while demonstrating they are taking COVID-19 protocols and procedures seriously.

“It’s a critical communication tool

that also conveys trustworthiness and authority,” Hong said. “For many of them, we provided copy that was then customized to each particular client for their preferences and branding, such as using their logos and matching their branding colors and styles. Many also added specific pages regarding their COVID-19 response and what families could expect.”

Additionally, a significant number of Hong’s clients have begun to hold regular videoconferences with families as well as virtual seminars for preneed sales. Hong will share what he and his clients have learned while navigating the pandemic – as well as everyday marketing best practices – during his talk titled “Turning Clicks into Dollars.”

Firms that have chosen to ignore the pandemic are making a costly mistake, Hong said.

“Even now that we’re arguably in the recovery phase, people want to know they’ll be safe,” he said. “They want to know exactly which services you’re permitted to provide and what limitations remain. Funeral homes who fail to communicate that right up front are missing a golden opportunity.”

As to some of the takeaways from his talk, Hong said he hopes firms will walk away knowing that social media does not generate many at-need calls – something he thinks is a widespread myth in the profession. “It just isn’t true,” he said. “Social media can be great for branding and preneed, but for significant at-need generation, you absolutely must use *intent marketing*. In this case, that means focusing on *search*.”

Preneed is where to focus on social media, Hong said. “Social media works well for this because you can communicate information about why people need to preplan, all the benefits of doing so, etc.,” he said.

### Straight Talk from Heffner

Ernie Heffner, president of Heffner Funeral Chapel & Crematory in York, Pennsylvania, and the 2019 winner of the International Cemetery, Cremation and Funeral Association Educational Foundation’s Lasting Impact Award, will share why



offering celebrant services has been a game changer for families – and his business – during a talk titled, “Celebrant Services: A Commitment that Appreciates Year after Year.”

“I believe celebrants are one of three primary keys for success in the 21st century,” Heffner said. “Our profession was built on traditions of religious ceremony followed by burial. Without meaningful, relevant ceremony, our profession will be in a financial death spiral, regardless of burial or cremation stats.”

According to a Christian ministers’ organization, Pastoral Care, each year about 7,000 U.S. churches close their doors and about 3,500 people a day leave the church, Heffner said. The “Nones” – or those without any religious affiliation, continue to grow in number – and more of them are choosing to honor a loved one without any help from a funeral home. But celebrants can help change that, he said.

“For more than 10 years since we first began offering celebrant ceremonies, I have been witnessing the positive emotional consequences and tracking the financial impact resulting from my associates creating and performing celebrant ceremonies,” Heffner said. “Unequivocally, certified celebrants enhance the ceremony experience both for client families and their attending guests while negating any relevance of burial or cremation rates. In my presentation, I will share our real-world statistics along with what we found to be true and what I was originally mistaken about.”

Countless positive comments from clients and ceremony attendees have been sent to Heffner and his staff, which has reaffirmed why celebrant certification is so important. “Bottom line of what I’ve witnessed: Celebrants get hugs, clergy not so much,” he said.

In Nashville, Heffner will share how to offer celebrant services, including how to select and educate staff – as well as who not to consider. He’ll also share pictures of services influenced by celebrants, how to educate the public via advertising and how to price and word celebrant options on the general price list.

### Due Diligence for Deals

Wendy Russell Wiener, managing member of WRW Legal; and Bill Williams, president, CEO and vice chairman of Funeral Services Inc., will deliver a talk titled “Due Diligence for Buyers and Sellers.”

“Our presentation will focus on the due diligence necessary for an effective transaction whether for the buyer or seller of a business,” Russell Wiener and Williams said.

As an example, Russell Wiener and Williams shared the story of a recent buyer they worked with who learned that the seller failed to withdraw funds related to fulfilled and canceled contracts from trust for a period of years. “The seller unintentionally left behind, for the benefit of the buyer, multiple six figures in trust,” they shared. “The necessary due diligence regarding trust would have revealed this information for the seller.”

During their talk, the duo will highlight the failure to:



- Utilize an industry specific checklist for due diligence.
- Examine the regulatory history of the target.
- Examine and reconcile all trusts prior to placing the business up for sale.
- Select transaction counsel with death-care specific expertise.

Attendees will walk away with a robust understanding of how to conduct due diligence, an industry specific checklist and insights on how to evaluate the condition of trusts associated with a business, they said.

### Turbocharging Your Website

Courtney Gould Miller, chief strategy officer, legal counsel and head of digital at MKJ Marketing, will deliver a talk titled “What Makes a Website Productive?”

Having a robust presence online has proved more critical than ever during the global pandemic, she said. “Now, the website is really the center of the business ... many people are never coming into the funeral home,” she said.

Even if there are no more lockdowns, many people will remain hesitant to walk into a funeral home because of health concerns, she said. “They are interested in virtual planning,” she said. MKJ has been working with its clients on pop-ups, safety precautions and more so that clients can feel safe – and so the funeral home can be seen as an expert, she said.

“We have also been working with our funeral estimator with clients, which allows clients to get an estimate of overall price of the services they’re interested in,” Gould Miller said. “We have been





Courtney Gould Miller

told it is really intuitive and easy to use – and that is exactly what people want. They don’t want a belabored process.”

In most places, lockdowns have lasted long enough to prompt consumers to expect virtual options from now on, Gould Miller said. “We have seen a major change in consumer behavior,” she said. “If this had been a two-week thing, I think we could have gone back to pre-pandemic consumer behaviors ... but we are not going back now. People are going to expect virtual for the foreseeable future.”

### Working with Hospice

Danny Funchess, director of operations in North Carolina for Park Lawn Corp., will highlight how to develop strong relationships with hospice care organizations – an area he has expertise in as both a hospice nurse and funeral director.

Funeral homes and hospice have a complicated relationship, which is often the result of misguided attempts from each side to communicate values and goals, he said. “As death-care professionals, we often do not take the time nor make the effort to understand hospice, their organization, their language, or the extent to which they are invested in patients and their families,” he said. “On the other hand, hospice professionals do not understand what motivates funeral directors and the extent to which we are engaged with families during the post-death experience. To put it bluntly, most funeral directors fear the propensity of hospice workers to move

families toward low-cost funeral initiatives; on the other-hand it is not uncommon for hospice workers to stereotype funeral directors as only concerned about money and profits.”

Beyond misunderstandings between the two parties, Funchess will explore how the pandemic has changed the dynamic between funeral homes, hospice and hospitals. “Since most COVID-19 deaths occur in ICUs or institutions, the handling of such deaths is not centered on the usual home-death scenario,” he said. “However, it is important to reach out to hospice and to initiate the conversation of what-ifs and to address the need for proper precautions if a COVID-19 death occurs at a home. Hospice wants to know that we have plans that will protect their staff, the family, and ourselves and that we are addressing all possible scenarios.”

Attendees who listen to his talk will walk away knowing the history of hospice, its values, its language and the important role it plays and will continue to play in death care, Funchess said. They will also learn how to begin and maintain a conversation with hospice to form a partnership and serve families together – as well as ways to communicate values to hospice care organizations.



Danny Funchess

### Serving the Famous

Carolyn Whigham, president and owner of Whigham Funeral Home in Newark, New Jersey, will share lessons learned serving high-profile people in a presentation called “High-Profile Funerals: The Good, the Bad and the Ugly.”

Whigham has presided over the funerals of Whitney Houston and jazz singer Sarah Vaughan plus family members of jazz trumpeter Woody Shaw, former basketball player Shaquille O’Neal and others.



Carolyn Whigham

“There are two valuable lessons I have learned from serving high-profile funerals. The first, as in all funeral services – the details matter,” Whigham said. “Understanding and listening to the needs, concerns, and the things that are most important to each family, allow me to make every funeral feel personal and unique.”

The second lesson, she said, is to anticipate the unique factors that surround a high-profile funeral. “Although the basic concept remains the same, small variables will change depending on the family being served,” she said. “As a funeral director working with such families, I deal with things that are uncommonly found in a day-to-day funeral service, which is why I must think outside that box to be prepared accordingly.”

When serving a high-profile family, mistakes are going to happen, Whigham said. “There are just too many moving parts to get it 100% right all the time,” she said. “As a funeral director, there are times we envision plans and executables that, for whatever reason, things do not go as planned. So, is that a mistake or par for the course? My take on this matter is to simply overcome the obstacle and find a way to successfully reach my goal, which is to execute an excellent service for the

family and keep the family's needs above all others. I am not hired to serve the politician who asked me to add them to the program at the last minute or cater to the reporter who did not get the vantage point that they wanted, or to the onlookers who wanted a program or a memorial card. The thing or things that I have learned is to execute the essential details of the service such as, the request the family tells me that are non-negotiable."

You can't get caught up in what is beyond your control: the focus must be on executing the service to the best of your ability, she said.

### Getting Preneed Right

Tyler Anderson, vice president of business development at Precoa, will deliver a presentation he calls, "Does Anybody Still Care about Funeral Service?" His talk will focus on the preneed value proposition, which he said is the best way for firms to grow.

"Some firms dismiss it, thinking preneed is not a critical piece of their business," he said. "The truth is, a proactive program expands market share, builds brand recognition and

awareness in the community, and increases at-need case volume. So, the mistake for many firms comes from not making this source of growth a priority."

However, simply using total sales to judge the success or failure of a program means you miss out on other valuable metrics, he said. "For one, measuring appointment set rates gives you a clear indication of how effective your marketing is," he said. "For another, appointment hold rates show you how effective your appointment setting process is."

Other critical measures include service and disposition types, average funeral value, and the ratio between preneed and at-need, he said. "The latter is a fairly simple leading indicator to evaluate how much new preneed volume you're gaining," he said. "And beyond all of these, there is a wealth of other data you can use to learn how to evaluate and improve your program. Understanding what each measurement can tell you so you can refine and adjust your preneed strategy is what makes the difference between sustained growth and stagnation."



At the conference, Anderson will also delve into the impact that the coronavirus has had on preneed. It has been downright drastic, he said.

Anderson hopes to see a large turnout at the conference, noting, "The Funeral Service Business Plan Conference will be a great opportunity to gather with other funeral professionals and to learn from a well-rounded group of thought leaders and experts." He added, "The conference is designed so that attendees come away with effective tools and strategies they can use to strengthen their businesses." •

## DON'T MISS OUT!

When you register for the Funeral Service Business Plan Conference by Sept. 30, you'll save \$100 off your registration. You'll also get the chance to arrive early and learn even more by signing up for the Cremation Strategies Conference Dec. 2 at the same hotel.

Attendees who book their room at the Renaissance Nashville Hotel in the heart of Music City will pay just \$204 per night when reserving a hotel room via the conference website. You must book your room by Nov. 10 to get the special rate.

Visit [www.katesboylston/events](http://www.katesboylston/events) to learn about the Funeral Service Business Plan Conference and Cremation Strategies Conference or email event coordinator Thomas Parmalee at [tparmalee@kbpublishings.com](mailto:tparmalee@kbpublishings.com).

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