

2023 ICCFA ANNUAL CONVENTION & EXPOSITION Kansas City, MO **BOOTH 925**

### Top Funeral Homes, Performers Honored at Precoa Celebration Event



Jimmy Lucas



Anthony O'Donnell



Jessica Celle



Charles Anderson

**PORTLAND, OR**— The nation's leading funeral homes and advance funeral planners from across the country have been honored by Precoa for their performance over the past year.

Precoa's advance funeral planners represent the highest concentration of million-dollar producers in the funeral profession, including several three-million-dollar producers and even a six-million-dollar producer. **Brian Whittecar**, Precoa vice president of sales, says the success of the company's Advance Funeral Planners

(AFPs) and funeral home partners is evidence of the effectiveness of the ProActive Model and the dedication of Precoa's hard-working teams across the country.

"We work with the best AFPs and best funeral homes in the profession, and I'm honored to be part of a team with such talent and drive," Whittecar said. "Across Precoa, our teams and our funeral home partners build trust with families and each other. That connection enables and encourages us to thrive."

Massachusetts-based **O'Donnell Funeral Home** was named a Precoa Distinguished

Partner. A partner for six years, their willingness to test new innovations and consistent support of the ProActive Model led to O'Donnell having their best sales year ever in 2022.

A Precoa partner since 2017, **Lucas Funeral Homes** was honored as a Distinguished Partner. Texas-based Lucas grew their preneed program's sales by more than 20 percent in 2022 and, more importantly, provided a path to healing for hundreds of families.

Precoa also honored **Charles Anderson**, founder of the **Outlook Group**, with a Lifetime Achievement Award. **Mark Hornbrook** and **Bret Davis** founded Precoa as "a place where everyone treats each other with kindness, love, and respect." Similar dreams inspired Charles Anderson. **CONTINUED ON PAGE B8**

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### 3 Reasons Investing in Technology During a Recession is a Smart Move

By Bill Williams

During turbulent economic times the natural tendency for many business owners and CEOs is to pull back the throttle and cut costs. There is another option: Zig while others zag and make smart investments, especially in technology, to position your business for rapid growth when the economy improves.

Fighting the conventional wisdom to trim capital investments and payrolls takes courage in today's business climate. Inflation is still high and the number of full services has been trending downward for the past several months, and that has funeral home owners and directors on edge.



Bill Williams

Our industry was aware the decline in services would happen – especially after mortality rates spiked to the highest level in 100 years during the pandemic – but it is still a tough pill to swallow. Add to that the increasing probability of a recession and you can see why deathcare professionals are concerned. It means sales and the jobs of their hard-working, dedicated employees are at risk.

Many company leaders cut back on investing in their businesses during tough times. The more successful approach, according to researchers at Harvard and McKinsey, is to make disciplined investments.

Harvard's experts found that companies that slashed spending more than their peers during a recession had "only a 26% chance of becoming leaders" when the economy rebounded. McKinsey researchers estimated that companies that bucked conventional wisdom and invested in their business had shareholder returns that were 46% higher than peers that cut back.

Each recession or economic slowdown is different. And since they develop over time (the pandemic being the notable exception), it is nearly impossible to predict when the tough times will begin. Nonetheless, savvy deathcare professionals can benefit from the insights of Harvard and McKinsey researchers to take the right steps to make their businesses more resilient, and significantly improve their competitive position when the economy recovers.

Here are three ways technology can help you increase sales and enhance the productivity of your staff:

#### 1. Investment in digital technology can help increase sales

During a recession, it is vital that your funeral home maximizes the potential of every sales opportunity. With at-need revenues slipping, funeral directors should focus on building a robust preneed sales pipeline.

Today's digital tools can help funeral directors better assist the increasing number of families who are planning end-

**CONTINUED ON PAGE B8**

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# How Cemeteries Can Benefit from Digitizing Records

By David Winkler

Many cemeteries today are dealing with a critical challenge: They are running out of room. Unfortunately, more burial space for expansion is hard to secure in light of booming urban expansion and stricter zoning regulations.

Another serious challenge cemeteries face is trying to manage a multitude of paper-based records in an increasingly digital world. It is a very manual process for cemetery staff to figure out which lots are available for sale and then to manage the paperwork associated with any new sales. Not to mention, what would happen if a cemetery lost its records due to an unforeseen natural disaster—with no other copies?



David Winkler

The cemetery industry is not typically known for utilizing newer technologies. However, the cost dynamics have changed. Now, it makes more fiscal sense for cemeteries to join the digital transformation that's been taking place across Corporate America for more than two decades. The costs of technology platforms and digitization have come down to levels where it is justified simply by the reduction in labor costs. Not to mention, the opportunity to eliminate the risk of having a single source of records on paper has never made more sense.

Digitizing records can decrease administration time and increase operational efficiency for cemetery owners and staff. Digitalization allows staff and visitors to immediately see available plots and provides the public with an option to make purchases online. Additionally, anyone can search to see who is buried in a cemetery, then automatically get a map that takes them from the entrance directly to the burial lot.

Public cemeteries can benefit immensely from digitizing their records, and the Town of Marshfield is a prime example.

## Town of Marshfield Gains Peace of Mind with Digital Records

Marshfield, MA is a 350-year-old town, 30 miles south of Boston on the Cape Cod Bay. Being locked in on one side by the Atlantic Ocean only exacerbated the space problem the Cemetery Department was dealing with.

The seven cemeteries spread across the Town of Marshfield were filling up pretty quickly, so the issue of cemetery expansion quickly became a priority. As such, The Board of Public Works requested an audit of the cemetery records to verify available lots. The problem the Cemetery Department faced was how to accurately and quickly review a storage safe full of thousands of documents dating back multiple decades.

The records, originally kept in a walk-in safe at Town Hall and using a filing process loosely based on the Dewey Decimal system, amounted to thousands of pieces of paper between the multiple maps for each cemetery, deed and burial cards along with copies of the actual deeds. At the time, the Board Chairman, being a technology proponent, wanted to see all the records digitized and easily available on computers.

The Cemetery Department selected a provider experienced in digital transfor-

mation and one that offered a proven, cloud-based cemetery records management platform to help.

The majority of the project was done once the documents were digitized. Immediately thereafter, the Cemetery Department's staff was able to review records, cross-checking questionable lots, and then rectifying them in the system.

Whether it was a superintendent, the cemetery foreman or the administrative clerk, they all now had immediate access and insight into the same cemetery information, getting a real-time overview of which lots were being used and which ones were available.

"The whole process of selling a cemetery lot prior to our digitization project was very, very tedious," said Dan Bowen, assistant superintendent of business administration for the Town of Marshfield. "Take the call, locate the paper map, get the ladder to reach the shelf where it's stored, make sure you have the right map, walk it over to the trailer, open the map to review it and call the person back to discuss options—and hope the map you have is accurate. The Cemetery Department operates at more than 90-percent efficiency now."

The Town of Marshfield's cemetery records-management solution uses a combination of innovative technologies, capabilities and customer support to successfully digitize and manage both old and new information. Over the course of eight years, digitizing cemetery records have delivered these results for the Town of Marshfield:

- Provided anytime-anywhere access to the same data at all cemeteries and Town Hall
- Eliminated redundancy of entering owner information onto three different documents
- Reduced staff time used for historical and ancestral research with newly created online public access to data
- Allowed for reports on sales by date, available lots and veteran lots to be created instantly
- Created interactive, visual maps that allow the public to find available lots, ultimately helping the town with lot sales
- Developed mapping navigation features that show the public how to find a burial location

## Do Your Due Diligence on Vendors

Before any cemetery begins a digitization project, it should conduct the necessary homework. Vendors under consideration should have the infrastructure in place to perform large-scale scanning projects and have a track record of working with cemeteries in the past. Also, cemeteries should look for solution providers that offer multiple options for storing and managing records, along with other applications such as digital signature, version control and workflow automation.

David Winkler is Executive Vice President and Chief Product Officer at DocuFree, a leading provider of enterprise information management (EIM) and digital business process services for cemeteries. For more information, visit <https://www.docufree.com/cemetery-records-management/>.

# Precoa Celebration Event

Continued from Page B7



Nectar Ramirez

son to start the Outlook Group in 1985. Anderson is a humble visionary, a loyal friend and a fearless leader.

Sales leader of the Year Nectar Ramirez may have started at Forest Lawn during a pandemic, but she has not let that slow her down. Nectar's focus on people and her drive for excellence helped lead Forest Lawn to not only their largest pre-need sales year ever, but also their largest year in cemetery sales.

Jessica Ceille's leadership has inspired everyone at Precoa. Her work to ensure her colleagues at Krause Funeral Home and Cremation Services feel valued resulted in an astonishing increase in pre-need sales and in Jessica earning the Sales Leader of the Year award.

Sean Riley, a Precoa regional director, earned the Field Manager of the Year award for delivering on Precoa's promise to grow and sustain pre-need sales. In 2022, he helped grow sales at many of his long-

time partnered funeral homes and helped his advance funeral planners surpass sales targets. Sean is known around Precoa for his genuine nature and always bringing out the best in others.

Joe Maughan, a Precoa regional director, earned the Field Manager of the Year award for an incredible year of helping families pre-plan their funeral arrangements. Joe puts his whole heart into helping others, and has dedicated himself to building up our up-and-coming leaders within the

company.

Precoa is the remarkably simple, incredibly effective way to 2x your pre-need. Through their marketing and sales program called ProActive Preneed®, funeral homes can breathe a sigh of relief. We take the burden of pre-need off your shoulders and give you the competitive edge of more leads, more appointments, more prearranged funerals, and phenomenal pre-need experiences that leave a lasting impact on families. To learn more, visit [www.Precoa.com](http://www.Precoa.com).

# Investing in Technology

Continued from Page B7

of-life celebrations for later in life. That is an important consideration given how consumer behavior has changed. In its 2022 "Funeral and Cemetery Consumer Behavior Study," the Foresight Companies found that 72% of consumers said making advanced end-of-life planning is a priority, which is 41% higher than the number planning services before the pandemic hit.

Pre-need recordkeeping and administration technology can be seamlessly integrated with websites so your business can collect a treasure trove of data when families are evaluating funeral services options. The data can help improve the productivity of your sales team (following up on the best leads, for example) and increase the probability of closing more pre-need business.

A successful pre-need trust program could be the difference maker in achieving or falling short of sales goals. Since pre-need trust contracts on average represent between 20% and 40% of revenue, enhancing sales with cutting-edge technology can help protect your funeral home's top and bottom lines when the economy sours.

## 2. Digital tools improve contract management accuracy

The importance of effective and efficient contract management (pre-need and at-need) cannot be understated. One simple clerical error can lead to the unwanted attention of federal and state regulators, which can severely damage your funeral home's reputation.

Contract management is even more critical during an economic downturn. Even the mention of a recession drives up the number of litigation and regulatory cases. There's no good explanation for the uptick when people get anxious financially, but it happens. FSJ's legal counsel, for example, handled more disciplinary and civil cases during the Great Recession (2007-2009) than at any other time in her nearly 30-year career as a healthcare regulatory lawyer.

Today's digital tools can help mitigate that legal risk and simplify records management. Here are some of key benefits:

- Funeral homes can create and edit electronic pre-need contracts based on changes made by families – with automatic, error-free calculations – from desktops, laptops or tablets, 24/7.

- Executed contracts can be uploaded directly, saving your funeral home staff time, and making it easy for client families to obtain a copy of the contract.
- Sophisticated contract management platforms can be regularly updated so all contracts comply with state and federal regulations, including the requirements of the FTC Funeral Rule and Cooling Off Rule.

## 3. Robust platforms make it easy for families to purchase funeral services

Offering families the ability to pay for services electronically is no longer a "nice to have" service. It is a "must have." The families in your community who frequently shop online at Amazon, WalMart, Home Depot or their favorite retailer are the same ones who want to purchase funeral services – and they need payment options. Foresight Companies estimates that "nearly 50% of consumers plan to finance their purchase," with 26% saying they will pay by credit card and another 21% using another payment plan.

Today's technology allows funeral homes to accept all major credit and debit cards, as well as alternative electronic payments, such as e-checks, mobile payments and ACHs. The technology also reduces the time your administrative staff spend on accounting entries. Just as important: Online transactions are immediately confirmed so your funeral home has timely access to the funds – and eliminates the risk of paper checks bouncing due to insufficient funds.

Make no mistake – 2023 is going to be a difficult year due to inflation, declines in services provided, and the threat of a recession. But if you invest in the digital technology solutions, you can protect your business – and the jobs of the hard-working people you employ – and position your funeral home for future growth when the economy rebounds.

Bill Williams is president and CEO of Funeral Services Inc., a leading healthcare trust administrator and subsidiary of death-care trustee and fiduciary wealth management firm Argent Financial Group. Under Bill's leadership, FSJ has expanded to offer services in more than two dozen states across the country.



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