



Case Study

How eContracts Help Increase Efficiency & Compliance for Preneed Programs

*SouthCare Cremation and Funeral Society
Atlanta, Georgia*

Situation

According to [Smartsheet](#), more than 40% of employees spend at least a quarter of their work week on manual and repetitive tasks, such as data collection and data entry. Specific to the deathcare industry, filling out, inputting and processing preneed contracts – which detail specific arrangements and payment plans – can take hours. Manual submissions are also subject to informational and mathematical errors, which beyond accuracy issues, can lead to falling out of regulatory compliance. As a forward-thinking deathcare professional, Dan Thompson, President of SouthCare Cremation and Funeral Society, sought a more efficient solution to optimize his preneed program.

Solution

FSI provided SouthCare Cremation and Funeral Society with its preneed contract software, eContract, which was developed specifically for the deathcare industry. This application enables FSI clients to create, edit and complete preneed contracts that are professionally formatted, compliant, mathematically error-free, and automatically uploaded to FSI's online recordkeeping system. Following the upload, the deathcare client can print, email or request FSI email the consumer a copy of the contract. When integrating eContract into its preneed program, SouthCare Cremation and Funeral Society transitioned its existing hard-copy contracts into FSI's system seamlessly.

Results

Soon after adopting eContract, Thompson and his team were able to utilize their office time more efficiently, stay in regulatory compliance and monitor the standing of each of their consumer contracts. All of Thompson's preneed business is written online using eContract and can complete contracts in less than 10 minutes. Thompson's team now spends less time filling out preneed contracts, no longer manually inputting data and has more time to seek out new business and grow clientele. Instead of managing loose papers, the contract records of SouthCare's preneed program are organized digitally in one secure, central location, and are accessible to view at all hours of the day.

“The transition to using eContract to streamline our clients' preneed contracts was smooth and seamless thanks to the FSI team. With eContract, our clients can receive the time and attention they deserve, and our staff does not have to manually input data or accidentally misplace papers. eContract is easy to use and has helped maximize efficiency within our preneed process.”

- Dan Thompson, President, SouthCare Cremation and Funeral Society

