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ICCFA Magazine author spotlight

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► Harbeson teams with Ryan Thogmartin to co-host a weekly video podcast called Funeral Nation.

► Educational information, including copies of this article, can be found at www.theforesightcompanies.com

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MARKETING

Marketing is crucial to your future, but it's difficult. It takes thought and planning, as well as the discipline and time to follow through with your plan. One crucial step is determining what segment of the market is likely to respond positively to your marketing message, and then figuring out how to reach it.

Strategic marketing to committed vs. undecideds

I am going to provide you with specific ideas about how to create a simple but effective marketing plan. No, not a cookie-cutter step-by-step guide you could find anywhere on the internet, but insights that are funeral-business specific.

Despite offering such insight, I realize this is an exercise in futility, and for the most part a waste of energy and ink. Why? Because sharing this information is very similar to a funeral director telling a family how to conduct their own funeral, from removal/transfer to interment. Most likely the family will not have the discipline to follow the plan as instructed. They will waste time trying to figure everything out, and end up having to spend more than expected for "DIY."

The same thing is true for funeral directors developing their own marketing plan. Most will fail to follow the plan, fail to have the discipline to execute it. In most cases, the result will be loss of business because they were too cheap to hire a professional.

But if you are still reading this article and want to give it a try, let's start with the basics of developing a marketing plan. What do you want to accomplish from marketing your funeral home brand? A good foundation is to carefully identify objectives, create a long-term approach to meet the established objectives and, most important, determine how those objectives are going to be accomplished.

To get started, what is the goal of a funeral home marketing plan? Of course, I know the #1 answer, the first one: **more calls!** Well, yes, but you're still not ready for a cameo appearance in "Mad Men" as a creative director at their Madison Avenue advertising firm.

What will compel a family to want

to move from a relationship with their current funeral service provider to one with your establishment? No, not the funeral profession mantra of "we give better service and care more than they do."

Consider the #1 reason a consumer chooses one funeral home over another: the consumer either knows the owner or someone working at the firm. These people are the "committeds." They already have established a relationship with a funeral provider. It's difficult to get the "committeds" to change their loyalties, so exhausting time, money and effort on marketing to them is not a good idea.

But these days, how many consumers do have a relationship with a particular funeral home? As a society, we have scattered all over the country (and even the world) and an increasing number of people do not have a clue about which funeral home would be their first choice.

Pay attention now, because I'm going to give you nugget of gold: There are more "undecideds" about funeral homes than "committeds." The question is, how do you reach this elusive "undecideds" group?

I suggest studying the how the U.S. Army develops a combat plan. The Army's five-paragraph operations order lists situation, mission, execution, service support and command and signal.

Note that the first need is to identify the situation. Now let's apply this to the development of your marketing plan.

Think of what's going on at your funeral home. Has the market you are serving changed? Is there new competition? What is the old competition up to?

Further questions to consider:

- Why would someone choose our firm?
- What makes our firm unique?

There are statistics that suggest boomers are more uncommitted and fall into the undecided category simply because boomers are not coming to terms with their own mortality. But if this is true, if boomers are not making end-of-life plans for themselves, who will be making those decisions for them? Bingo, Skippy! Gen Xers and millennials.

- Who are the people at our funeral home who make us special?
- After a family is served by us, how do they feel about the experience we created?
- What message do we want to convey to people about our firm?

If the undecideds are the largest opportunity for new business at a funeral home, the message and how it's delivered should be at the top of the list.

The best way to find out why your current committed families chose your firm is to conduct a survey. A professionally conducted survey reveals not only what your families think about your funeral home, but also what they are telling others in your community.

Also reach out to families you have served recently, both first-time clients and long-time ones. Invite them to lunch, offsite, and talk to them about what they liked and didn't like, and what you can do better. Ask them to provide you with a testimonial. For example: "We have been coming to this firm for three generations because..." or "With an unexpected death in our family, we chose this firm because they provided so many options to celebrate the life of..."

Testimonials are good, but no one will tell your funeral home story better than you and your team. Heritage is important, but proceed with caution, as it does not resonate with the younger generations making end-of-life decisions for their elderly family members.

We see what was considered the norm for consumer behavior becoming unimportant. The best example of this shift is church attendance. Across religions, participation continues to plummet and is especially low among millennials. When creating your funeral home's story, your family history is honorable and should be a part of your story—but not your whole story.

What are consumers looking for today? The first thing that probably pops into your mind is low price, but that's simply not true. If that were the case, funeral homes would be closing in droves.

Most people are looking for a good experience. Yes, it's possible to have a good experience in both a Chick-fil-A as well

as a Morton's of Chicago, as long as your expectations are set correctly. Conversely, it's also possible to have a bad experience at both ends of the restaurant spectrum.

The point here is that consumers are seeking a positive experience and cost is not the driving factor. When creating your funeral home story, make sure the positive differences you made on what most people consider their worst day are known.

"We care more" does not accomplish that. Instead, share celebrations of life examples and testimonials; tell others about the people who work at your firm; add visually inviting graphics of your location.

All of your story cannot and should not be told in a two-minute video. In fact, attention spans for watching such advertisements are much shorter, so break your video up into segments. Did I say video? Yes; don't waste your time or advertising dollars with copy (written words). There is a place for written articles, but think: Whom are you trying to reach?

After you create your story, it's time to consider the best methods for distributing your message so that it reaches the most "undecided" people. Unfortunately, one size does not fit all.

I'm sure it's no surprise to you that delivering a message to consumers can be a dicey situation. You may have the most compelling advertising in the funeral business, but if no one sees it, what's the use?

Let's think about who the undecideds are. I am going to take a "scientific guess" that Gen Xers and millennials combined (those born between approximately 1965 to 1995, respectively) make up the majority of this consumer segment.

By the way, millennials have surpassed the baby boom generation as the largest living population. If baby boomers are the target clients for funeral homes (they are next in line to die), which category would boomers fit into—committed or undecided?

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for themselves, who will be making those decisions for them? Bingo, Skippy! Gen Xers and millennials.

OK, now I've got a tough question for you: Where do you think Xers and millennials get their information and news? No, it's not from the local Daily Disappointment newspaper. Nor do these folks seek out a funeral home in the Yellow Pages. In fact, I am going to go way out on a limb and guess that these folks didn't even notice the much-coveted advertisement on the diner placemat.

Without any trepidation, I surmise that the best channels of distribution for your funeral home story is on the internet. (If you are among those who still think "the interweb is witchcraft and of the devil," please keep the Yellow Page ads in your budget for next year.)

The very first location to place your story is on your funeral home website. My suggestion is to have several short videos covering many subjects about your firm and the services you offer.

An inviting and well-designed website pays tremendous dividends, because this is where the undecideds are going to learn about you. Perhaps you may even convert some of them to "committed." If your funeral home has not updated its website in the last three years, it is outdated and needs to be refreshed.

Frankly, there is no excuse for funeral homes not to invest in this showcase of your business with a global reach, your website.

A robust social media campaign will drive traffic to your funeral home website, but deciding on the right content to be posted is key. Unfortunately, this is an area where funeral professionals fail.

Preneed solicitations, obituaries and non-relevant content along with inconsistent posting is a waste of time. The methodology of social media reach is complex, especially for businesses that rely on this medium as part of their marketing program. Remember what I said at the beginning of this article about DIY funerals? The same holds true for social media: If you don't know how to do it, hire a pro.

Social media, videos and websites are not the only tools contained in a savvy

funeral home marketing plan. The creation of community educational events is one of my favorites. If your firm has a retort, you'd be surprised how many people will show up for a tour.

When was the last time you sponsored a seminar? If you and your staff are not equipped to be speakers, invite professionals, experts in different topics of interest to your community.

You and your staff can certainly present information about topics such as:

- The top 10 mistakes made when planning for a funeral.
- Veteran's benefit information for survivors.
- 50 ways to celebrate the life of your lover (referencing the Paul Simon song).

If you offer a free lunch, too, you will boost attendance.

How about inviting all the hospice social workers and marketing staff for a seminar about what happens after their work is done? This is particularly effective because you become the subject matter expert to the people who spend time with those who are dying. Educating hospice organizations

provides your funeral home with the ability to become a resource for people working with families dealing with end-of-life issues.

Share with hospice workers your state regulations on topics such as 48-hour refrigeration or embalming rules and the time period a physician has to sign a death certificate. The transfer of knowledge to hospice only pays dividends.

How do you move the committeds from your competitors' funeral homes? Usually, the other funeral home sends them to you by screwing up. The easiest way to attract committeds is to be a "top of mind" firm where your brand stands out from the others.

One of my favorite marketing activities is "if the phone isn't ringing, go out singing." In other words, if it's quiet at the funeral home, fire up the lead car and go shake hands. Visit anyplace that has any community influence.

Have something interesting to say, such as your story. Leave something behind—a thumb drive containing all your videos and planning information—and always offer good writing pens. Get your carcass out of the office, because sitting back at the

firehouse waiting for the "death bell" to ring does nothing but make you crazy and lazy.

Here is the bottom line: If you want a million-dollar business, you can't make a minimum-wage effort marketing your funeral home. There is no magic to marketing, but it does require thought, planning and execution.

Marketing is like planting seeds—you don't get fruit after a few weeks of watering and cultivating. It takes time, energy, consistency and execution to turn marketing into death calls at your funeral home.

You may have read this entire article thinking "this sounds pretty easy." But a true evaluation of your own marketing will measure not only whether your firm has grown in call volume but also whether it has increased in value. If not, perhaps it's time to take a step back and talk with a professional to create positive momentum.

The time requirements of being a funeral director coupled with the tasks of operating a business can lead to business strategies created without the attention they deserve. At the top of the list is marketing. 