

by Paul White and Wendy Russell Wiener

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## 'Online' Equals Efficiency, Compliance & More Successful Pre-need Sales

The "Digital Age" brought companies and consumers many technologically advanced products and services we now use on a day-to-day basis. Today, many industries utilize technology and online systems to conduct their work.

Despite this era transition, deathcare is one of the few industries significantly behind the trend of using technology to improve sales. This resistance from industry professionals may stem from distrust in technology or complacency in how they have successfully generated and converted leads for many years. Some industry leaders may be surprised by the unintended consequences they face and the opportunities they miss by not incorporating more technology into their sales program.

*According to Smartsheet, more than 40 percent of employees spend at least a quarter of their workweek on manual and repetitive tasks, such as data collection and data entry.*

From an efficiency and compliance standpoint, automation can significantly improve how your sales team spends its time managing leads and building a stronger reputation for your business and with your clients.

### More Time = More Growth Opportunities

For some people, digitalization of the workflow processes is intimidating because their roles may become obsolete due to automation. Transitioning the pre-need sales process to an online workflow does not equate to replacing humans with computers. Instead, online pre-need sales will save businesses the time typically spent on traveling to and from the clients' location or entering data.

Online pre-need sales also allow employees to focus on other tasks. More importantly, funeral homes and cemeteries will have more time on their hands to seek new business opportunities and give current clients the time and attention they deserve.

### Better Organization & Compliance = Stronger Reputation

Not only does an online workflow save your staff time, but it keeps all of your files and contracts organized and professionally contained in one place. With technology, pre-need contracts can be uploaded to an online database for you and won't get misplaced. Having your pre-need contracts in one place will keep your files organized.

Even though 16 hours of the workweek is ample time to enter data from pre-need contracts, there is still room for error. Any data errors with your pre-need sales could lead to improper commission payments and possibly even risks of breaking regulatory and compliance laws.

In addition to data errors, processing and completing pre-need sales through paper trail can result in funeral homes and cemeteries falling out of compliance. You can fall out of compliance by merely missing the required deposit deadline due to a postal service delay, or a calculation error in your pre-need contract. These are risks you are taking if you do not use an automated process for your pre-need sales.

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### **Greater Accuracy = Happier Clients, More Referrals**

With the automated process for pre-need contract creation, every pre-need contract can be compliant with state law and the FTC Funeral Rule. And every contract can be mathematically error free, including the calculation of monthly payments and service charges. Reaching back to a client for a re-signing due to correction of a mathematical error or other discrepancies leaves a negative impression. Greater accuracy will create more trust with the clients and provide a more positive experience for all parties involved.

Many professionals in the deathcare industry are using an online workflow to manage pre-need sales and produce meaningful results.

**Case in point:** Dan Thompson, president of SouthCare Cremation & Funeral Society, recognized a need to simplify the pre-need sales process when he saw his staff spending valuable time on manual and tedious tasks. This includes making endless edits and revisions to pre-need contracts in order to stay in compliance, or traveling to visit a client regarding changes within the contract.

Dan transitioned his pre-need sales to FSI's eContract software in February 2018.

With eContract, pre-need contracts may be duplicated, so a couple saves time when selecting the same services and merchandise. eContract also pre-populates contract language that keeps Dan's contracts in compliance with regulatory laws.

Don't be hesitant to change your pre-need sales processes because of common misconceptions about technology. Change can be intimidating, but in this case, it brings greater efficiency, compliance, and time to pursue new business opportunities. It can result in increased sales and an even more sustainable business model for years to come. □

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