

Technology

By Welton Hong

Now It's Essential: Funeral Firms Must Integrate Remote & Cloud Tech

Editor's Note: This article was written shortly after state and local authorities responded to COVID-19 social distancing needs by mandating certain hardline restrictions on funeral services. However, it focuses on the need for death-care businesses to leverage contemporary tech business practices regardless of a particular situation.

When the coronavirus crisis turned the entire funeral industry upside down in practically a matter of days, was your firm prepared?

If not, don't feel too bad.

You weren't alone. Not by a long shot.

Frankly, *most* funeral service providers in America – including more than a few large, corporate-owned businesses – immediately found themselves between a rock and a hard place.

While some had incorporated a few digital tools into their everyday business practices, even those weren't regularly doing Zoom meetings to organize staff, meet with families at-need or do virtual seminars to sell preneed.

For the most part, they weren't using cloud-based project management tools such as Trello to manage cases – a needed evolution from the physical whiteboard.

For the most part, they weren't livestreaming life celebrations for family members who were overseas or unable to travel due to health issues – and they weren't prepared to immediately start livestreaming when authorities mandated gatherings limited to as few as 10 people.

To be clear, I'm not talking about digital marketing tools, even though

that's usually my primary focus. This isn't about SEO or pay-per-click ads or social media. With a few exceptions, this isn't about marketing at all.

This is about actual day-to-day businesses practices. In this area – if you'll forgive the "tough love" I have to lay out – the American funeral industry overall remained far behind the times in employing contemporary business tools, compared with other industries.

So, when COVID-19 restrictions struck the death-care industry, its businesses remained woefully unprepared. And that's still the case.

Of course, an unprecedented crisis such as this would have rocked operations to some degree no matter how prepared a business was.

However, both the severity and the widespread effect of the disruption would have been mitigated by firms that were already prepared to adapt rapidly.

In fact, some – still far too few, but *some* – firms did have at least a couple of technologies in place, and they have been able to soften the impact of COVID-19 restrictions a bit.

But by my estimation, that group comprises fewer than 5% of all burial and cremation service providers in America. For everyone else, this has

impacted business in ways the industry has never seen before.

With all that said, here's the fundamental question: What should death-care firms do *now*?

Funeral homes can't turn back the clock, but they can immediately incorporate a number of remote and cloud-based business tools that will protect them better in any crisis.

And to be clear, these aren't just tools death-care businesses need in a crisis: They're tools that firms should be using all the time – regardless of whether they're dealing with a pandemic lockdown or everything is completely "normal."

These tools make business much *easier*, more *convenient* and more *efficient*. And they don't even require a massive financial investment. In fact, some require virtually no investment at all!

While I want to be careful not to expound about my business – it's important we keep the focus on funeral firms – I think a brief overview will help you gain a better understanding of remote and cloud technology's benefits.

Practically since I founded my digital marketing company, Ring Ring Marketing, I've been able to run it from anywhere. I have over 50 employees,

and I can communicate with them, share files, do online video meetings, oversee projects and much more from anywhere.

I do it from the office and at home. I do it from hotel rooms all over America and even overseas. Thanks to remote and cloud technology, I can run my entire business from anywhere, at any time. While I do *enjoy* working in the office with my staff, and while I *enjoy* meeting with clients and partners face to face whenever possible, I also can do all of these things remotely at any time.

And given that I'm constantly on the road (under normal circumstances), having this tech infrastructure isn't a luxury – it's a necessity.

At my firm, we use Trello to manage projects. We use Microsoft Teams for internal communication and file sharing, in addition to MS Outlook for email. We use Zoom for video meetings, both internally and externally. I alone average over three dozen Zoom meetings every single week. We use MindMeister for collaborative planning.

Those are just a few of the digital software tools we use every single day. But I won't dig into the others right now, because it's important we focus on the ones that are most important to death-care services.

But the key point I want you to take from this is that all those tools – and the resources we invest in them – are based in the cloud. Nothing is stored on local hard drives. I (and my entire team) can access all of our data from anywhere at any time.

If something terrible were to happen to my office building on some random weekend, believe it or not, we would be fine. We wouldn't lose anything but some replaceable computers. Everything we do, all of our data, is securely stored in the cloud.

I note all of that because incorporating similar practices will make your funeral home more efficient at *all* times, and they're especially beneficial during crises that force you to rapidly change course.

I certainly realize that a marketing company is *massively* different than a funeral home. Some of the things we do here will not apply to burial and cremation services, but you'd be sur-

prised how many actually do.

The top thing you should consider is Zoom – which you're almost certainly familiar with by the time you're reading this.

There's no reason to "get fancy" with video conferencing. Zoom is the easiest and simplest tool there is, and for most uses, it's *free*. For no cost, you can do one-on-one meetings for as long as you like or meet with up to 99 others for 40 minutes per session.

Zoom works great for meeting remotely with your staff. It works for meeting with families about immediate needs when you can't meet in person. It works for hosting "virtual" preneed seminars when you can't conduct those in person.

Although Zoom is supposed to password-protect all new meetings by default, that hasn't always been the case.

So make sure all of your meetings are automatically protected. Go to the "Meetings" tab, click the "Edit" button under your personal meeting ID, check "Require meeting password," and put in a password. It's also a good idea to update your password regularly and be careful with whom you share it.

Moving beyond Zoom, Trello is extremely easy to learn for project management uses. It uses digital boards, cards and checklists to keep your entire staff updated on the status of everything you do. It comes in a free version and has a very inexpensive plan for a little more functionality.

The COVID-19 crisis has showed us these tools are no longer optional: *They're essential.*

Those are just a few of its uses. And it requires no special technology. Virtually every laptop computer manufactured in the last six to seven years comes with an internal camera and microphone. That's all you need. Those features are also standard on tablets and smartphones. If you're out and about and need to jump on a quick Zoom meeting, just use your phone!

Before moving on, I want to note a couple of things:

First, note that my firm and I have no promotional agreements whatsoever with any tools mentioned in this article, including Zoom. I'm simply passing along my recommendations, based on my experience, to help funeral firms.

Second, we're all aware that a number of security concerns about Zoom were raised shortly after the COVID-19 lockdowns went into effect. Some nefarious hackers have been using auto-generated "meeting finders" to randomly find unprotected meetings and troll them with inappropriate content – a practice known as "Zoombombing."

Of course, that's concerning, but in reality, the number of affected meetings is very small. The important thing is to keep your meeting ID private and to ensure it's password-protected.

As I noted before, it can be used for fundamental processes such as tracking the steps in a disposition. You can track each step from home, on your smartphone, sitting at the dinner table.

You can easily tag staff members, leave comments, push back or push up deadlines, provide updates and changes from the family, etc., in real time.

And again, these are only a couple of the many cloud-based tools you can use to do business in a crisis or at *any time*. I plan to provide more education on these tools in future articles.

In the meantime, here's the bottom line: The coronavirus pandemic has been absolutely tragic, and our hearts go out to everyone affected by it. It's unfortunate that it required such a devastating situation to shine a light on how much the industry needs to adapt.

However, that's the situation, and all we can do is learn from the lessons this has taught us.

Incorporating remote and cloud-based technology isn't simply "future-proofing" anymore. It's the present. Every funeral home owner needs to understand how welcoming digital tools into their business practices ensures that their firm survives and thrives now and in the future. •