

# Best Practices for Online and Offline Marketing

By Welton Hong



If I asked professionals—inside or outside the marketing industry—to name some marketing best practices, you can bet the answers would include things like keyword research and creating expert content for your blog. Even deathcare professionals often default to digital when discussing marketing.

But marketing and advertising are huge umbrellas, and the landscape covers much more than digital initiatives. In fact, according to Forrester Research, digital will only account for an estimated 46% of ad spend in 2021.

If we're going to talk marketing best practices for funeral homes, cemeteries, and other funeral service firms, we need to expand our view and come up with some advice that works online and off.

You might be surprised to learn that those best practices have a lot more to do with **overall business processes** than with nitty-gritty details such as how many longtail keywords to include on a page.

## 1. Optimize Processes for Efficiency and Accuracy

The best marketing starts with strong processes. Whether you want to publish authoritative content on your funeral home's blog or send direct mailers that convert, you need a workflow that gets you there. Unfortunately, deathcare firms often have great workflows for their lines of business but treat marketing tasks a bit "fly by night."

For example, consider what happens when you receive an at-need call. Chances are you have processes in place that ensure things work literally like clockwork, because you can't afford to miss the timing on pickups and care of the decedent. Plus, you have a bevy of loved ones depending on you to help get things in order for services, burials, or cremations.

That same devotion to the details can help improve your marketing. Here are some tips for creating optimized marketing workflows:

- **Create business-facing goals.** Know the **why** behind your efforts. Obviously, you want more clientele, but get specific. Do you want to raise revenues by 10% year over year or increase the number of calls you get? The first might require marketing more luxury funeral products while the second is all about generating more traffic.
- **Assign responsibility.** Put people in charge of marketing—even if you don't have a marketing department. Someone from your business who you trust should be responsible for working with in-house and external marketing resources to ensure efforts align with business goals, remain in budget, and continue to move toward end goals.
- **Set deadlines and milestones.** Put end dates on various projects and tasks and, if necessary, break them up into milestones. If you want to publish a landing page, you need dates for keyword and other research, copywriting, editing, design, and publication.
- **Check in regularly.** Don't assume everyone involved in your marketing processes knows what they're supposed to be doing and have it covered. Put someone in charge of following up and checking in to ensure all tasks are completed and come together as planned.
- **Use project or task management software.** Managing all these processes in email or disparate Google sheets gets old fast. Instead, consider investing in a task management software program that helps keep everyone focused and in-the-know about needs and expectations. Trello and Todoist are two options you can try for free. They let you see where marketing tasks are at a glance, which makes it easy to manage those processes while spending most of your time serving clientele.

## 2. Involve the Right Stakeholders and SMEs

Marketing is a comprehensive business endeavor. It shouldn't be limited to one department or person in your organization—or handed 100% over to a vendor without input from the right stakeholders.

Consider involving some of the following subject matter experts in planning and executing on your funeral home marketing:

- **Customer service and sales departments.** These are the people who interact with potential and existing clientele, so they'll have wisdom to impart about specific client needs and concerns.
- **Funeral directors and other experts.** People who can offer insider information on the processes at hand can help you craft informative, high-quality content that helps you connect with consumers online and off.
- **Legal or compliance personnel or consultants.** Have a process to ensure marketing and advertising meet regulatory requirements, including the Funeral Rule.
- **Financial stakeholders.** Whether it's the business owner or accounting office, someone needs to provide a budget for marketing and approve extra resources as they're needed.

## 3. Use Data to Inform Marketing Choices

It's tempting to rely on your expertise when it comes to marketing. You know your clientele. Deathcare pros on your staff have had in-depth, caring conversations when many families or those seeking preneed services. It should be easy to take that knowledge and convert it into radio ads, online content, or direct mailings that engage your audience, right?

No, that's not always the case—especially when you're marketing alongside competition. After all, the other funeral homes in the neighborhood also employ deathcare professionals that can pull from experience and conversations with clientele.

The marketing efforts that perform best are based on data **as well as** experience. You can start with industry benchmarks and information you can find online. For example, if you see a lot of people are searching "cost of funerals" every month, it indicates a concern about budgeting for final arrangements. You can use that information to craft online content that meets those concerns, but you might also create a direct mailing addressing the topic.

You should also create marketing campaigns that build on your own data. If you run a radio ad, use a specific inbound phone number so you can tally how many calls the ad generated. Keep track of traffic on your webpages, how people find you, and whether direct mailings drive traffic to your site or make your phone ring more. You can print a QR code on a direct mailer or use a specific URL so you can track where the page hits are coming from.

As you gather data on what works best for your firm, you can build increasingly competitive marketing campaigns that drive more traffic, conversions, and revenue.



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**Welton** is a leading expert in helping funeral homes convert leads from online directly to the phone line. He's the author of the book *Making Your Phone Ring with Internet Marketing for Funeral Homes*. Learn more at [FuneralHomeProfits.com](http://FuneralHomeProfits.com).