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FAMILIES FIRST: LEVERAGING TECHNOLOGY TO BUILD CUSTOMER RELATIONSHIPS

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The rise of information technology (IT) had been a pivotal driver of business growth in many business sectors. However, it was proving to be challenging to incorporate IT into “offline” industries such as Canada’s CA$2 billion[[1]](#endnote-1) funeral services industry. In the funeral and bereavement services industry, establishing, maintaining, and enhancing long-term relationships with customers was essential to customer retention.[[2]](#endnote-2) In part, the information era had evolved the routines that firms in this industry used to manage customer information for providing value and establishing long-term relationships with customers.[[3]](#endnote-3)

Although the North American funeral services industry had been trying to keep pace with the rapid information era, the global COVID-19 outbreak in 2020 posed new challenges. Bereavement establishments across the world now had to not only adhere to tough restrictions on in-person gatherings and funeral practices, but also keep up with the ensuing digitization of customer relationship management and communications, while matching the value expectations of customers.[[4]](#endnote-4)

For nearly 25 years, Brian Parent and Mary-Lynn Parent had successfully operated multiple branch locations of Families First Funeral Homes & Tribute Centre (Families First) across the Windsor-Essex region in Ontario, Canada. In 2020, the region of Windsor-Essex had a population of just over 336,000, and the city of Windsor represented the most diverse mid-sized city in Canada, behind the Toronto, Vancouver, and Montreal metropolises.[[5]](#endnote-5) The Parents had opened their family-run operation in 1996 and had since expanded to four locations, allowing them to serve families across the region. Families First remained one of the only family-run operations in the area as it manoeuvred through the information era, transformations in the funeral service industry, and demographic and cultural changes. Despite his many previous successes, Brian remained focused on continuous business improvement, saying, “I don’t know today that I feel successful; I still feel challenged today. Am I meeting the needs of the cultural changes in the city? We need to meet diversity and financial needs. More important, am I meeting the individual need of every customer? How am I making their life better than what it could be otherwise? We need to make sure that we are able to adjust and change.”

As of June 2020, funeral homes across the globe had been forced to set a new standard of care by using technology to communicate with all stakeholders and deliver customer service virtually. In the midst of the COVID-19 global pandemic, with traditional face-to-face client mourning and funeral services curtailed, Brian needed to act swiftly to retain strong customer relationships while providing services during a pandemic. When asked about implications of the pandemic, Brian explained, “Well, it means that we are going to have to do more meaningful services on a smaller scale. We need to make sure that when families are just gathering as a family that that time is very meaningful, and that we’re doing things that help them to look outside themselves and realize that their father’s or mother’s life was important, and that it’s okay to stop to take a few moments to remember them.”

Brian was also quite aware of the increased importance of providing value to customers by leveraging technology. Even when the pandemic was over, technology would continue to provSide many opportunities for client management. However, he knew this would be a challenge, saying, “So, we’re dealing with a lot of people in a lot of age groups, and as we deal with these different age groups, we have to be able to accommodate whatever their needs are.”

THE FUNERAL SERVICES INDUSTRY IN CANADA

The funeral services industry had the unique position of inevitably touching everyone’s life. The industry involved funeral homes, crematoriums, cemeteries, bereavement service providers, employees, and the public.[[6]](#endnote-6) In the city of Windsor, an array of communities with different cultures and traditions were served by the local funeral homes. Often, families chose which kind of funeral service they would hold according to their traditions, preferences, and costs. In Canada, most funerals occurred one to four days after the death, so that family members would have ample time to prepare for the funeral and wait for funeral attendees to arrive from wherever they were travelling.[[7]](#endnote-7)

For a traditional Canadian funeral service, there were fees associated with the viewing of the body in advance of the funeral service and with other services related to burial, entombment, or cremation; funeral practices in Canada entailed customary observances for the deceased, and arrangements were made to dispose of the body. A funeral service typically had to meet regulatory legal requirements and a set of social requirements. Most Canadian provinces required a funeral home to employ a funeral director to supervise a service, though in most Canadian provinces, services were optional.[[8]](#endnote-8) The funeral director, staff, and/or family members of the deceased could help prepare the body for cremation or burial. Different staff required different provincial licensing; for example, embalmers (embalming was a common practice), had to be licensed. A visitation or vigil was held in the presence of the deceased as part of common funeral practice in Canada. The deceased could be placed in an open or a closed casket in order for family members and friends to pay their final respects. It was customary for certain communities to recite prayers, perform religious customs, and/or read poetry and play music to celebrate the life of their loved one. The final ceremony included either a burial or a cremation. The norm for interment was ground burial in a private or public cemetery, followed by a grave marking to honour the deceased.[[9]](#endnote-9)

Generally, funeral homes in Canada charged a basic fee that could be augmented with value additions. For the basic fee, the funeral home obtained the necessary funeral permits; obtained the death certificate; coordinated with religious institutions, cemeteries, or crematoriums; and took care of the deceased’s remains.[[10]](#endnote-10) The funeral home was responsible for transporting the deceased to and from the morgue (in Windsor, the morgues were located in the hospitals) and to the funeral home in preparation for the funeral service. The funeral director of the chosen funeral home was responsible for providing ample instructions to the family of the deceased, such as appointing someone to deliver a eulogy, or choosing a charity in lieu of flowers.[[11]](#endnote-11) Other traditional funeral costs—which included but were not limited to the provision of a casket, embalming or preparing the body for viewing, the use of the funeral home for visitations or viewings, and equipment for the graveside service—could be packaged together for the sake of simplicity for the customer. Moreover, in Windsor, the funeral homes partnered with other businesses in the area in order to provide holistic services to their customers. The homes typically partnered with florists, newspapers, musicians for the funeral services, crematoriums, and cemeteries. Consequently, the overall costs of funeral services in Canada could be very high: a traditional funeral service could cost from $5,000 to $10,000.[[12]](#endnote-12) In contrast, a cremation cost between $2,000 and $5,000. [[13]](#endnote-13)

However, the total cost of a funeral service varied quite a bit, as it was affected mostly by the number of services selected. Nowadays, the array of services offered by funeral homes was quite large. For example, families could choose the number of days of visitation or the ornaments used during the ceremonies. At Families First’s main location, families could hire catering services for visitors, and the organization even had a specialized team that created customized promotional material for the funerals. Services such as these made it possible for families to tailor the ceremonies and materials according to their wishes and to the profile of the deceased, enabling families to create very meaningful emotional moments⎯which were particularly important during a time of mourning.

Over the past two decades, Canadians had been choosing cremations and alternative options for different elements of the funeral services; for example, some shopped online for caskets in order to cut funeral service costs. Cremation services also provided families with more options and alternatives for issues such as the timing of the funeral and the choice of what was done with the deceased’s remains. The provision of such flexibility was important to customers, as they valued options that provided individualization and personalization.[[14]](#endnote-14) Another factor that might have contributed to the rise in cremations was the dwindling of religious ties in Canada. According to the Pew Research Center, about three in 10 Canadians were either atheist (8 per cent), agnostic (5 per cent), or “nothing [no religion] in particular” (16 per cent).[[15]](#endnote-15) The religiously unaffiliated population in Canada had risen from 4 per cent in 1971 to 24 per cent in 2011 and 29 per cent in 2018.[[16]](#endnote-16) Finally, Canadians had become more diversified in terms of religion, with 8 per cent of Canadian adults identifying as Muslim, Hindu, Sikh, Jewish, or Buddhist, creating demand for a greater variety of funeral rites and traditions (see Exhibit 1 for a description of some of the different cultural traditions and funeral rites). This rise in demand for personalization and individuation in funeral services also created opportunities for funeral homes to provide extra care in order to strengthen ties with customers and satisfy their needs.

The World Health Organization declared COVID-19 a global pandemic[[17]](#endnote-17) on March 11, 2020.[[18]](#endnote-18) As of March 2020, Windsor’s funeral services industry was facing major challenges due to COVID-19-related restrictions, with the region having reported its first COVID-19 case on March 20, 2020,[[19]](#endnote-19) and its first death on March 31, 2020.[[20]](#endnote-20) The shift away from traditional funeral service options was exacerbated due to government restrictions and was associated with heightened safety costs during the pandemic. As of June 30, 2020, there was a total of 35,068 active COVID-19 cases in the Canadian province of Ontario. Windsor fell under Ontario’s provincial pandemic measures, which stated that no more than 10 individuals were permitted to gather at one time.[[21]](#endnote-21) This had major implications for the bereavement sector, as the rules and protocols around transporting the body, holding the funeral, and “disposing” of the body were changing daily.[[22]](#endnote-22) Brian commented on the pandemic to the *Windsor Star*: “The biggest thing that’s heart-breaking is every time we meet a family and they haven’t been able to be with their loved one when they passed. And that’s very difficult on families. What are we doing to care for those people? How are we encouraging the friends who aren’t able to be here and physically give the family a hug? How are we encouraging them to do something more than just saying, “Hey, I’m thinking about you”?[[23]](#endnote-23)

As Brian thought about the new challenges he faced, he felt more confident as he reflected on all of the challenges that he and his wife Mary-Lynn had overcome in the past as they were building Families First.

The Beginning: SMITH to White

In 1979, at the age of 19, Brian started working for John Smith, a family friend who owned a funeral home and memorial chapel. Smith saw potential in Brian as he watched his work ethic develop. Brian had agreed to work for Smith on the weekends doing odd jobs, such as gardening and vacuuming after services, but one day, Brian was asked to transport a body. He did so, but hesitantly, not without understanding the importance of his role in this task. Smith was so impressed with Brian that he offered him a permanent job. After a few months, Smith urged Brian to attend Humber College, in Toronto, to complete the Funeral Director diploma program and even offered to pay for it. In late 1980, Brian took the opportunity to attend college, knowing it was the best course of action for him, as he felt deeply connected with the service provided by a funeral home. After completing the one-year diploma program and a consecutive year of internship, Brian returned to work full time at Smith’s Funeral Homes and Memorial Chapel for three years.[[24]](#endnote-24) In 1983, Smith decided to sell to the business. Brian had to decide how to move forward in light of this change.

After much contemplation, Brian did not see how he would fit with the new corporation that was acquiring Smith’s Funeral Homes and Memorial Chapel and decided it was time to move on. He felt that he had much more to learn with respect to operations and customer service. Brian accepted a funeral director position at White Funeral Home (White), where he was responsible for management and marketing; at that time, marketing was somewhat of a rarity in the funeral services industry. During Brian’s time at White, things changed for the funeral services industry, which shifted from being a practical, necessary service provider to being a well-marketed, profit-oriented business sector. As the operations manager and funeral director, Brian was able to observe and learn from White’s expansion from one funeral home in 1983 to four by 1996. Brian was putting in 60- to 70-hour work weeks, and as he contemplated how to best invest his time and energy, he devised many ideas about how funeral homes could improve the services they provided. Brian and Mary-Lynn soon decided it was time to start their own business. Brian believed he could make a difference in Windsor-Essex’s funeral home segment and knew that his time at White was coming to an end.

FOUNDING FAMILIES FIRST

Brian and Mary-Lynn, who had been married for 12 years, decided to scout properties all over Ontario in the hopes of opening their own funeral home. They settled on a property in South Windsor that would provide instant income and help avoid the costs of building a structure from the ground up. On May 6, 1996, the Parents opened their first funeral home, in Windsor, making Families First the first new funeral home to open in the city in more than 60 years. The Parents took out a private loan to finance the business. Brian was the only full-time employee, as everyone else was employed part-time and Mary-Lynn continued to work as a nurse while also managing the finances for Families First.

When Brian and Mary-Lynn opened this first branch of Families First, they outlined a conservative five-year business plan. Although they forecasted 60 funerals per year, their business plan was conservatively based on 50 funerals per year. Brian was able to service 76 funerals in the first year and 130 funerals the subsequent year. Families First was growing faster than anticipated, and Mary-Lynn joined the operation full time a year after the opening. Rather than taking salaries, Brian and Mary-Lynn lived off their retirement savings. Brian built an addition onto the funeral home in 2000 to accommodate larger funeral gatherings. By 2005, in spite of a modest population increase in the area (12 per cent),[[25]](#endnote-25) Families First had grown to service over 400 funerals a year, having a growth rate of more than 500 per cent in the period. With the ever-increasing demand for services, the Parents required more space. They relocated Families First to a larger building in South Windsor in 2005. At this time, the team consisted of 20 part-time and full-time employees.

Brian and Mary-Lynn were able to expand their facilities to three more locations in addition to the South Windsor funeral home. In 2010, Families First opened an East Windsor branch, servicing 130−240 funerals a year. In 2011, Brian purchased a funeral home in the suburb of LaSalle, making it the Parents’ third Families First location. During this expansion, directors and staff were moved from the South Windsor and East Windsor locations to serve families in LaSalle. A suburb of Windsor, LaSalle served many families from the nearby town of Amherstburg. Recognizing the potential clientele in Amherstburg, Brian seized the opportunity and built a fourth funeral home in Amherstburg in 2015. In addition to the four properties, Families First also owned the Cremation Society of Windsor & Essex County Inc., which had opened in 1998. Having cremation capabilities gave Families First a definite edge over the competition, since more people were becoming interested in crematory services instead of traditional burials.

*RAVING FANS*⎯DEVELOPING CUSTOMER-FOCUSED STAFF

As the Parents were finding success with their funeral homes, the funeral services industry was changing. Brian credited the success of Families First to listening to his team’s recommendations⎯especially in regard to the design of the new location in South Windsor and the goal of delivering excellent customer service across all funeral homes. During the onboarding process, Families First employees were required to read *Raving Fans: A Revolutionary Approach to Customer Service* by Ken Blanchard and Sheldon Bowles; this texthelped transform the management style at Families First. The requirement to read the text presented to employees a clear message that the business was not just about funeral services; it was also about outstanding customer service. After all, the Parents named the firm before they even had a team. In fact, Families First was the first funeral home in Windsor-Essex region that wasn’t named after the owner.

Brian and his team were dedicated to connecting to the families they served; they asked each family about what the perfect day would look like for the deceased in order to provide value-added services. The funeral service industry was beginning to shift toward shorter, more flexible funeral services, and Families First was the first in Windsor to embrace this shift. Additionally, Families First was one of the first funeral homes in Windsor to arrange slideshow videos of the deceased and their loved ones. Technology was gaining momentum within the funeral and death services industries, and Families First had hired an in-house graphic design team to design cards, slideshows, videos, and other meaningful material for families. Brian was not afraid to take suggestions from his employees, many of whom were of a younger generation, and this allowed Brian to continue to evolve the services being offered by Families First.

ADJUSTING TO CONSUMER SHIFTS

In 2016, the Cremation Association of North America projected that the cremation rate in Canada would be 74.2 per cent by 2020.[[26]](#endnote-26) This turned out to be fairly accurate, with an upward trend having been witnessed for years. The percentage of cremations had grown along with the total number of deaths. The local newspaper reported that in 2018, 72.1 per cent of Canadians residing in Windsor-Essex had chosen cremation over traditional burials.[[27]](#endnote-27) With cremation services rising, Brian felt good about Families First’s capacity to meet these demands, stating, “Well, probably the biggest change that has been going on within funeral services is a definite move toward cremation. And when people move toward cremation, many times they are reducing the number of services that they are requesting.”

In 2020, Brian reported that Families First was servicing approximately 700 cremations a year at the crematorium in the main South Windsor location. Families First, the only funeral home in the region that had an onsite crematorium, was focused on finding a way to provide superior client care. The advantage of an onsite crematorium was that it allowed Families First to avoid third-party transactions and have greater control over the quality of the services being offered. It delivered cremations efficiently, with care and transparency. Brian’s team had prepared for this shift in consumer needs with Families First’s onsite crematorium, which had a 90-minute cycle compared to older, natural gas crematoriums, which had four- to five-hour cycles. The new crematorium was also environmentally superior because it burned minimal amounts of natural gas, instead using mainly oxygen or air from outside. Brian explained, “The whole operation is much cleaner than older crematories. So, it allows families to be present and view the casket going into the crematory. It’s an automated process, whereas it isn’t at other places.” He further pointed out the environmental benefit, saying that “one storefront location of McDonald’s impacts the environment more in a day than our crematorium does in a whole year.”

The majority of Canadian households showed that they had adopted environmentally conscious behaviours, and the funeral industry was shifting accordingly.[[28]](#endnote-28) Even though Families First was working toward making its cremation process environmentally sustainable, its consumers were not aware of this and did not understand the details of the process. In 2015, Windsor Chapel, a competitor funeral home, also acquired its own crematorium, and it was able to offer cremation services for all three of its funeral home locations.

Windsor was among the fastest growing cities in Canada. According to a Statistics Canada census, between July of 2017 and July of 2018, there had been a 2.5 per cent annual increase in population in the city.[[29]](#endnote-29) The Windsor census data, which included Tecumseh, Lasalle, and Amherstburg, revealed a population total of 349,718 in 2019 and a median age of 41.1, slightly older than the national average of 39.5.[[30]](#endnote-30) Statistics Canada reported that the largest age group residing in Windsor was within the 35−64 age range, while 17 per cent of residents were over the age of 65.[[31]](#endnote-31)

Frazier Fathers, the director of continuous improvement for United Way/Centraide Windsor-Essex County, said, “Windsor has become a landing community for the newcomer population.” He explained, “We now have an established population of newcomers who may be sharing information back to their home country—their friends or relatives—[that] they should also come to Windsor.”[[32]](#endnote-32)

Brian embraced Windsor’s diverse cultural groups. For example, the Filipino community had been very loyal to Families First because of the way that Families First addressed and respected their unique cultural and personal customs. Families First customers came from a wide variety of ethnic and religious backgrounds. These customers appreciated the “little things” that demonstrated Families First’s commitment to addressing and meeting their multicultural needs. For example, a fireplace, installed inside the funeral services building, allowed family members to complete specific and important religious rituals of burning clothing or other articles during the service.

The nature of the funeral home industry could be complicated because thinking about and planning a funeral for oneself or a loved one was usually a frightening and extremely uncomfortable process. As in other sensitive situations, many people felt more comforted when they were actually with another person while making funeral arrangements, rather than making arrangements digitally. However, regional demographic shifts and the global pandemic had increased the relevance of and need for stronger technological capabilities.

The recessed economy of 2006−2010 had had a negative impact on the Windsor-Essex population, driving many young adults to venture out of Windsor in search for jobs. Consequently, many of the family members that Families First had served were no longer in the same city. Naturally, Families First needed to adjust to clients travelling into the city from great distances, some of whom would stay for short periods of time. This increasingly necessitated condensed visitations and services, according to Brian. The next generation needed to be considered as well. For a long time, the funeral services industry in Canada had been stagnant and traditional. With cultural changes and the rise of IT and online consumerism, funeral directors were forced to pay more attention to how they operated their businesses. The industry was also seeing an increase in online service companies, such as basicfuneral.ca and casketoutlet.ca, and even retail giants, such as Walmart Inc. and Costco Wholesale Corporation, selling caskets on their websites. Yet in spite of the growth in online offerings of services and products related to the funeral home business, after the initial phase, some of these options almost completely disappeared due to problems. For example, competition from big-box stores shrank after the stores ran into shipping and quality control problems selling caskets.

On average, the cost of a funeral at Families First in 2020 was $7,800; however, the total cost when factoring in subsidiary charges such as cremation, flower arrangements, and newspaper announcements raised the cost to around $15,000. Online shopping for a casket made this expensive product more affordable for people, although most people still chose to purchase caskets from their chosen funeral home. People in their 30s and 40s, planning in advance for their parents’ eventual funerals, were also increasingly looking online for a greater number of services and convenient access to information regarding pricing, funeral arrangements, and other digitally customized arrangements. Eileen Barak, the executive director of the Ottawa-based Funeral Service Association of Canada, noted, “We are seeing some trends toward online and consolidation, it is not as quick as it is in other industries, and not as rapid as it is in the [United States]. . . . There is still that need for the personal touch. It’s not just about once the tragedy has happened to an individual family, it’s pre-planning and estate planning, navigating social services.”[[33]](#endnote-33)

DigitalLy Delivered COMPASSION

Families First had the ability to communicate with customers through email to arrange funeral services details, but the majority of families preferred to finalize arrangements in person. Families First used Microsoft Access to manage the company database and track everything⎯including the car list, employee schedules, visitation times, and customer information. The company had information in this program dating all the way back to 1997. Even though many software programs had entered the market, some even specific to the funeral home industry, Families First just continued adding data to its Access database because the program was easy and familiar. However, Families First’s client relationship management system was not fully operational online. Rather, word-of-mouth promotion was more important to Families First, as Brian explained: “Our clients are really anybody who we come in contact with and each and every friend of a family member. When someone comes in to visit a family and they are given good direction, assistance, and comfort, then they are most likely to select us in the future. So, our clients are everyone we touch. Our customers are really those people we have touch points with. They are not people we’ve advertised to.”

While Microsoft Access, a relational management system often used by small businesses or individuals, allowed users to create very clear lists, customers were not able to use the program to plan and interact online. To fill this gap, the Families First website was redone in 2018. Brian hired a marketing company to rebrand Families First to make it softer, less gender-specific, more inclusive, and more approachable, with the slogan “We celebrate life.” The new web page allowed families to submit messages, photos, and videos for their loved ones through an embedded email or a Mailto link. This link could also be used to inquire about services and to pre-plan one’s own funeral.

Other software systems were available in the market that were highly customizable for the funeral home’s specific needs; the features and add-ons were endless (see Exhibit 2). Due to COVID-19, it had become increasingly difficult to provide meaningful value additions to customers online without alienating them. In June 2020, Ontario enacted strict restrictions on gatherings and visitations for the deceased. Under these restrictions, the provincial government allowed only 10 people to gather, including funeral service attendees. This created a demand for live streamed funeral services and required the funeral home to operate primarily online in communicating with external partners (e.g., florists, caterers), clients, future customers, and employees.

Prior to the enactment of COVID-19 restrictions, Families First had regularly offered bereavement seminars that featured speakers such as Dr. Alan Wolfelt, a leading North American death educator, author, and grief counsellor. The attendance for some of these seminars had reached up to 800 people, while smaller bereavement seminars, such as the Grieving Hearts Program, engaged about 50−100 people. Most participants already tended to use the website to sign up online for the seminars, but the seminars themselves were not available online. Families First used its Microsoft Access database to send emails about upcoming promotions and bereavement events. Recognizing the social shift toward smaller and condensed funeral services, Brian investigated how to deliver meaningful services on a smaller scale.

Providing value would include Families First getting to know the deceased and their loved ones⎯figuring out what was important to them and what their perfect day would look like. There was value in celebrating the life that had been lost and helping family and friends experience a fitting goodbye. As discussed earlier, funeral homes needed to show the family that they could offer personalized and customizable services, and this required gathering information about what was important to the deceased and their loved ones. The challenge of planning a funeral online under COVID-19 restrictions demanded that the funeral home adapt its whole process, from selling to orchestrating services. Countries all over the world had to change their protocols with respect to funeral practices and funeral home operations as a result of the pandemic.

Generational differences presented various options for delivering digital compassion. As the baby boomer generation aged, subsequent generations—in particular millennials—became more receptive to the idea of planning for wills and funerals well in advance.[[34]](#endnote-34) Such “death positivity” allowed millennials to converse and inquire about funeral and will planning without the negative social connotations. Many arrangements could be made prior to death; these included pre-planning funeral arrangements, wills, and donating body parts for medical research or transplants.[[35]](#endnote-35) Millennials were price-sensitive, with a desire to reclaim their relationships with death from big corporations and the funeral home industry.[[36]](#endnote-36) Companies like LegalWills were seeing a surge in millennial customers wanting to proactively plan their wills. A host of other death-planning platforms had surged in Canada as the $2 billion funeral industry coped with a digital shift. Brian observed a shift toward smaller services that were highly condensed to accommodate members of younger generations travelling to Windsor just for funerals. It was important for the funeral industry to find ways to build an ongoing rapport with these new generations, recognizing the increasing importance of the Internet as a source of information and a sales channel.[[37]](#endnote-37)

THE DILEMMA: USING TECHNOLOGY TO DEVELOP A STRONG STAKEHOLDER MANAGEMENT PLAN

Brian was increasingly aware that he needed to better incorporate technology into his stakeholder and client management. He knew there were many types of software, but he wanted to focus on the types of features that might help him reach a clientele that was very diverse in terms of cultural and generational demographics. How could he include technology in planning, execution, and retention strategies for the various stakeholders? How could he meet their different needs as they planned for and experienced such an important and emotional service? Brian noted that Families First would have to find new ways of connecting with its customers to let them know that the Families First staff was thinking about them. As he commented, “Grief cannot be put on pause.”[[38]](#endnote-38) These thoughts underlined the importance of leveraging IT to develop database management and marketing communication strategies to reach all stakeholders—in an industry where human contact was crucial.

exhibit 1: Diverse Funeral Rites and Customs

Canada was known for its diverse population; it was a country composed of people from many different cultures and religions. In Canada, a typical funeral ceremony included the transportation of the deceased body to a funeral home, where it was embalmed, washed, dressed, placed in a casket, and cosmetically restored to prepare for the viewing. This was followed by the service, which might take place at a religious establishment or the funeral home, after which the deceased was either buried or cremated. A recent trend favoured memorial services that celebrated and honoured the deceased by remembering individuals’ accomplishments through a variety of offerings such as poetry or music recitals during the ceremonies. Over the last two decades, a shift toward non-traditional funeral services had been recorded in Canada. The following table displays a breakdown of religious affiliations of Canadians by Statistics Canada.

|  |  |
| --- | --- |
| **Religion** | **Percentage of Canadian Population** |
| Christianity | 67.3% |
| Islam | 3.2% |
| Hinduism | 1.5% |
| Sikhism | 1.4% |
| Buddhism | 1.1% |
| Judaism | 1.0% |
| Indigenous Religions | 0.2% |
| Other Religions | 0.4% |
| No Religious Affiliation | 23.9% |

Source: Table created by the authors based on information from Statistics Canada, “Two-Thirds of the Population Declare Christian as Their Religion,” February 19, 2016, https://www150.statcan.gc.ca/n1/pub/91-003-x/2014001/section03/33-eng.htm.

*Christianity*

The Christian religion was divided into many sub-groups, including (but not limited to) Catholic, Orthodox, Baptist, and Protestant groups. Christian funerals abided by the Christian belief that there was an afterlife. Those closely connected with the church would normally hold a service at the church with the body present. More commonly, especially in urban areas, a visitation or vigil was held at the funeral home or funeral home chapel. Generally, Christian funerals took place within a week after the death, and open caskets were permitted during the visitation or vigil. To prepare for the service, a process called embalming might take place, through which an embalming solution replaced the deceased’s bodily fluids, which were drained in an effort to preserve the body for viewing. Prayers and hymns were recited throughout the funeral service and it was common for close friends or family to give remembrances. The service ended with closing remarks by a minister or priest, and a procession led to the cemetery, where the casket or coffin was laid to rest. A grave was usually marked by a tombstone or markers. Most Christians preferred burials to cremations, but there was an increasing number of Christians who were opting for cremations.

*Islam*

Muslim funerals were holy occasions that served to comfort the grieving and to pray to God to have mercy on the deceased. Embalming and cosmetic restorations were not generally carried out because the body was traditionally wrapped in a shroud immediately after it was washed. The burial normally occurred on the same day as death, when possible. First, the deceased was washed, by an adult of the same sex, an odd number of times, usually three times. Once washing was complete, the body was then wrapped in three large white cloths (for men), and five large white cloths (for women).

EXHIBIT 1 (CONTINUED)

*Islam (continued)*

A Muslim funeral service took place at a mosque, where the deceased was present and funeral prayers were recited by all members in attendance. Islamic traditions did not permit cremations; therefore, the deceased was transported from the mosque to the cemetery for the burial. The grave was dug perpendicular to Mecca (Islam’s most sacred site) so that the deceased’s body was placed in the grave facing Mecca. A layer of wood or stones was placed on top of the body to prevent contact between the body and the soil. Each attendee placed three handfuls of dirt in the grave until the grave was filled, and a marker was placed on the grave.

*Hinduism and Sikhism*

Hindus and Sikhs believed in reincarnation and karma. Both religions had similar funeral customs and rites. Mourners and funeral attendees might dress in white clothing, and the remains were usually cremated. The body was washed, prepared according to various traditions, and dressed in white clothing. Embalming was optional, and an open casket visitation was the norm. Hymns and prayers were recited throughout the service or visitation. Close family or friends might be permitted to recite remembrances in the form of eulogies or speeches. Hindu funeral services might include a fire sacrifice at home or at the funeral home, if permitted, to make offerings to ancestors and gods. Both religions typically submerged the cremated remains in a body of water.

*Buddhism*

Buddhists, similar to Hindus and Sikhs, believed in a continuous cycle of life, death, and reincarnation. Buddhist funeral practices differed according to the different denominations of Buddhism. An altar was set up to display the deceased’s portrait, along with offerings such as candles, incense, flowers, and fruit, and a portrait of Buddha was placed in front of or beside the altar. To begin the funeral process, the deceased had to be washed and clothed in the everyday clothing the deceased would normally wear. Buddhists believed that the soul did not immediately leave the body once the person had died, and touching was limited so as to avoid disturbing the soul. Viewings and embalming were permitted if the family wished to partake in these. Typically, the funeral took place the following day, conducted by a monk. On the morning of the burial, monks were invited to perform the last rites, which included chanting and prayers. Afterward, at the funeral service, guests were expected to slightly bow toward the deceased as a sign of appreciation for lessons regarding life. During the service, meditation, which was a traditional Buddhist custom, took place along with reflections on the deceased’s life and honouring of their memory. Once the ceremony had ended, the casket was transported to the burial or cremation site. Cremation was heavily favoured by Buddhists.

Source: Gillian Poulter, “What’s Traditional about ‘The Traditional Funeral’? Funeral Rituals and the Evolution of the Funeral Industry in Nova Scotia,” *Journal of the Canadian Historical Association* 22, no. 1 (2012): 133–159, https://doi.org/10.7202/1008960ar; Earle Waugh, “Funeral Practices in Canada,” The Canadian Encyclopedia, January 13, 2010, https://www.thecanadianencyclopedia.ca/en/article/funeral-practices; “Christian Funeral Service Rituals," Funeralwise, accessed January 25, 2021, https://www.funeralwise.com/customs/christian\_overview/; CVH Team, “Planning a Funeral," Canadian Virtual Hospice, May 2019, https://www.virtualhospice.ca/en\_US/Main+Site+Navigation/Home/Topics/Topics/Decisions/Planning+a+Funeral.aspx; “The Embalming Process,” Basic Funerals and Cremation Choices, August 1, 2017, https://basicfunerals.ca/funeral-industry/the-embalming-process/; “Islamic Funeral Guide: Etiquette, Rites, & Traditions,” Burial Planning, accessed February 2, 2021, https://www.burialplanning.com/resources/religious-funerals-guide/islamic-funeral-guide; “Hindu Funeral Customs and Rituals,” Funeralwise, accessed February 2, 2021, https://www.funeralwise.com/customs/hindu/; “Sikh Funeral Customs,” Funeralwise, accessed February 2, 2021, https://www.funeralwise.com/customs/sikh/; “Cultural Funerals: Muslim Funeral Services,” Basic Funerals and Cremation Choices, accessed February 2, 2021, https://basicfunerals.ca/cultural-funerals/muslim-funerals/; “Buddhist Funeral Service Rituals,” Funeralwise, accessed February 2, 2021, https://www.funeralwise.com/customs/buddhist/; “Buddhist Funeral Traditions,” Everplans, accessed February 2, 2021, https://www.everplans.com/articles/buddhist-funeral-traditions.

exhibit 2: Customer Relationship and Funeral Management Software Features

*Customer Relationship Management Systems*

Family Link (family and friends of the deceased): a personal, private online link for family members

* Collect phone numbers, emails, addresses.
* Subscribe to a newsletter.
* See a full list of services.
* View prices for the services.
* Learn about third-party integration.
* Make secure online payments.
* Link to live streaming platform.
* Use electronic signatures
* View, upload, and access all required documents (e.g., insurance, death certificates) in paperless format.
* Communicate and make requests about funeral arrangements.
* Upload pictures or videos.
* Sign the guest list and send flowers, gifts, or messages to the family.
* View other grief resources and education.

Profile of the Deceased

* Collect information and automate a newspaper draft.
* Note all funeral details.
* Store copies of paperless information: health card, social insurance number, death certificate, insurance, and will information.

*Funeral Management Systems*

* Certified e-payments
* Insurance assignments, to be paid through insurance firms
* Electronic signatures
* Task manager: a shared calendar of services, visitation, and appointments; consolidated from website bookings, Outlook, iOS, and Google calendars
* Resource scheduler: allows the streamlined scheduling of staff, vehicles, visitation rooms, service rooms, graphic designers, etc.
* Financial reports: allow users to see the numbers in a timely manner, and to use the data to guide price increases, employee bonuses, and compare services (e.g., burials versus cremations)
* Live streaming of the funeral
* Virtual filing of all personal client files, contracts, videos, and pictures
* Access from anywhere (web access); no need to install the software on several computers; portable and usable on any device

Source: Created by the authors based on “Procession: Customized Funeral Home Management,” SRS Computing, accessed December 2020, https://www.srscomputing.com/procession.

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