



The Innovative Mindset:

A new way to think about change

 Passare®




Covid changed **everything** about funerals

Ernie Morgan had a choice to make. His mother died in 2020, and because of COVID restrictions, he could only invite 9 other people to the funeral.

Unfortunately for Ernie, the funeral home had no way of streaming the service. So, not only did he have to grieve the death of his mother, he had to choose the people who would attend the service...and those who wouldn't.

This isn't an isolated incident. As COVID cases went up, I heard more stories of funeral homes that were unprepared for the coming changes.

What's scary about this and the dozens of other quotes I found is how funeral professionals describe their relationship to new technology. Rather than embracing the change or even anticipating it, they felt "forced." So, this got me thinking: even if the funeral home ran out to get all the latest technology for Ernie's mom's funeral, it wouldn't answer my bigger question of why the funeral home didn't think they needed it to begin with.



Funeral directors said the pandemic has forced them to embrace technology and become more creative in how they interact with grieving families.

Farooqui, S. (2021, July 13). *The funeral home industry is expected to embrace video technology post pandemic* | CBC News.



*Information is not
transformation.*

Richard Rohr

It's not about the technology

The last few years have been tough for many professions. For the funeral profession, the pandemic has made a problem even more clear: many funeral homes were not ready to meet the digital needs of families. If you haven't already noticed, families are more digital than ever. In fact, families expect to get more done online, and that includes funeral planning.

Software companies, including Passare, have ways for families to preplan, sign documents, and write their obituary entirely online. So, your funeral home just needs more technology, right?

While that might help, the problem goes deeper than that. Let me explain.

A few years back, my family got a new car. Compared to our last one, this was a major upgrade (automatic windows, locks, and even seat heaters). One day, as I was putting my son in his car seat, I noticed a compartment on the ceiling between the driver and passenger seats. I hadn't seen it before. I pushed on it, and out popped a screen. I had been driving this car for months and had no clue it could play movies - something my 6-year-old does not let me forget.

When I purchased the car, I was looking at it to solve one problem: getting my family and me safely to our destination. I hadn't really been looking for it to do anything else. So, while I had all this technology at my disposal, I was not thinking about the problem in that context.

Solving problems families didn't even know they had should be your goal. To do that, you're going to need a new way of thinking about how you approach problems and solutions.



We need a new mindset





The brain is an amazing thing. It knows we have other things to worry about, so it helps us out by memorizing our routines and habits to save mental energy. Ever gotten in your car to drive home, and the next thing you know, you're in your driveway and don't remember making a single turn or stop light? That's your brain at work - what scientists call neuroplasticity.

But this is also why we gravitate to what's worked before without much thought to whether or not that routine or habit is going to work in the future. While it saves your brain energy, there are few things in life that don't require some sort of change, especially when it comes to business. It's difficult to break out of our habits, but science shows that we can create new routines.



To create new routines and break old habits, we need a new mindset - one that helps us to push forward and challenge our brains to think differently. Through my countless conversations with funeral directors, I've noticed that most funeral homes fit into a pattern. I've categorized them into 3 mindsets, all of which we'll talk about in more detail:

1

Some refuse to change or completely ignore the changes that they may know they need to make. This is an **ignorant mindset.**

2

Others are reactive, choosing to change when compelled or when absolutely necessary. We call this an **idle mindset.**

3

Lastly, some are proactive, always looking ahead to meet the needs of their families. These funeral homes have an **innovative mindset.**

It's impossible to fit all funeral homes into a single category, let alone a mindset. As you read, your back-office processes may fit into one mindset and the way you work with families in another. I don't want you to use this as a way to label your funeral home. Instead, let it help you change to better meet the needs of your digital families.

The ignorant mindset:

Ignoring the problem





Kodak, the once-mighty film giant, developed the technology for the first digital camera but didn't release one for 20 years. Steve Sassoon was the Kodak engineer who developed the prototype. When he presented the idea to the board, they said, "That's cute - but don't tell anyone about it." Kodak went on to get over 1,000 patents for their digital technology but never used them. Why? Because they made a lot of money selling film and wanted to keep it that way.

The board could see change coming, but instead of embracing it, they fought against it. You might even say they ignored it. They wanted to do what they had always done: sell film. And we know how that turned out.

Some funeral homes have had a similar reaction to change. Imagine if a family asked to meet with you online, and instead of you doing what you could to accommodate, you insisted the family come in.

You may tell yourself, "We would never do that," and I hope not. But I have heard those stories from families before. Funeral homes with outdated technology and processes are not usually that way because they couldn't change - they just didn't want to. Rather than embracing change, these funeral homes refused and even ignored the needs of their families.



Traits of an ignorant mindset

Simply put, funeral homes that put their needs first and ignore the needs of their families have this mindset. Before you are quick to dismiss this as something others deal with, let me give you an example.

I sat in on an embalming seminar where the presenter, who specialized in extreme cases, said it was not uncommon for him to get calls from funeral homes unwilling to embalm a body because it was “unworkable.” When he would look for himself, what he found was not an “unworkable” body, just one that was going to take effort, something the funeral home was not willing to do. In other instances, the body bag hadn’t even been opened yet.

These are funeral homes putting their needs over that of the family who, if given the choice, would’ve wanted to see their family member one last time.

Funeral homes with an ignorant mindset follow two patterns



They focus on methods over mission.

Method is what you do. Mission is why you do it. For Kodak, while I don't know their exact mission, I could guess that it had something to do with capturing memories. Which does that better: film or digital? Film can break down, be destroyed, or even lost. Digital, as long as it's backed up, is timeless. So, why did Kodak refuse to embrace digital photography? Their methods (selling film) became more important than their mission (helping customers capture memories).

For ignorant funeral homes, the way they have always done things is so embedded that they refuse to do anything different, even when faced with the evidence.

They're not proactive or reactive.

They're inactive.

Within the first 2 years of joining the funeral profession, I lost count of how many times I heard these phrases:

"My son/daughter is going to be taking over the business. I'm going to let them handle that."

"I'm about to retire/sell. I'm not looking to make any big changes."

This sounds reasonable at first. After all, why "rock the boat" if you don't have to? But there are risks with any decision, even if you change nothing.

The problems with an ignorant mindset



There's a risk in doing nothing.

It's common to hear about how hard change is or the risks involved. What is not usually talked about is the risk of NOT changing. Dr. Alan Wolfelt, a leading death educator and grief counselor, has said that a funeral home unwilling to change should go ahead and put a sign out front that says, *"Slowly but surely going out of business."*

Not changing means not being able to stay ahead of the trends and the changing needs of families. I don't need to convince you that families have changed. You see it and have experienced it. Therefore, why not make business decisions to meet the needs of those families?

The next generation needs you now.

Anyone who has been in the profession for more than a few years has a story to tell. Those of you who have been doing this for 20+ years have wisdom, do's and don'ts, and some good advice. The next generation needs you. Help them bring about much needed changes within the profession.

If you find yourself in this mindset, you're not alone. We've all tried to ignore the changes we know are coming. But now that you know, will you change or keep doing the same thing?

The idle mindset:

Reacting to the problem

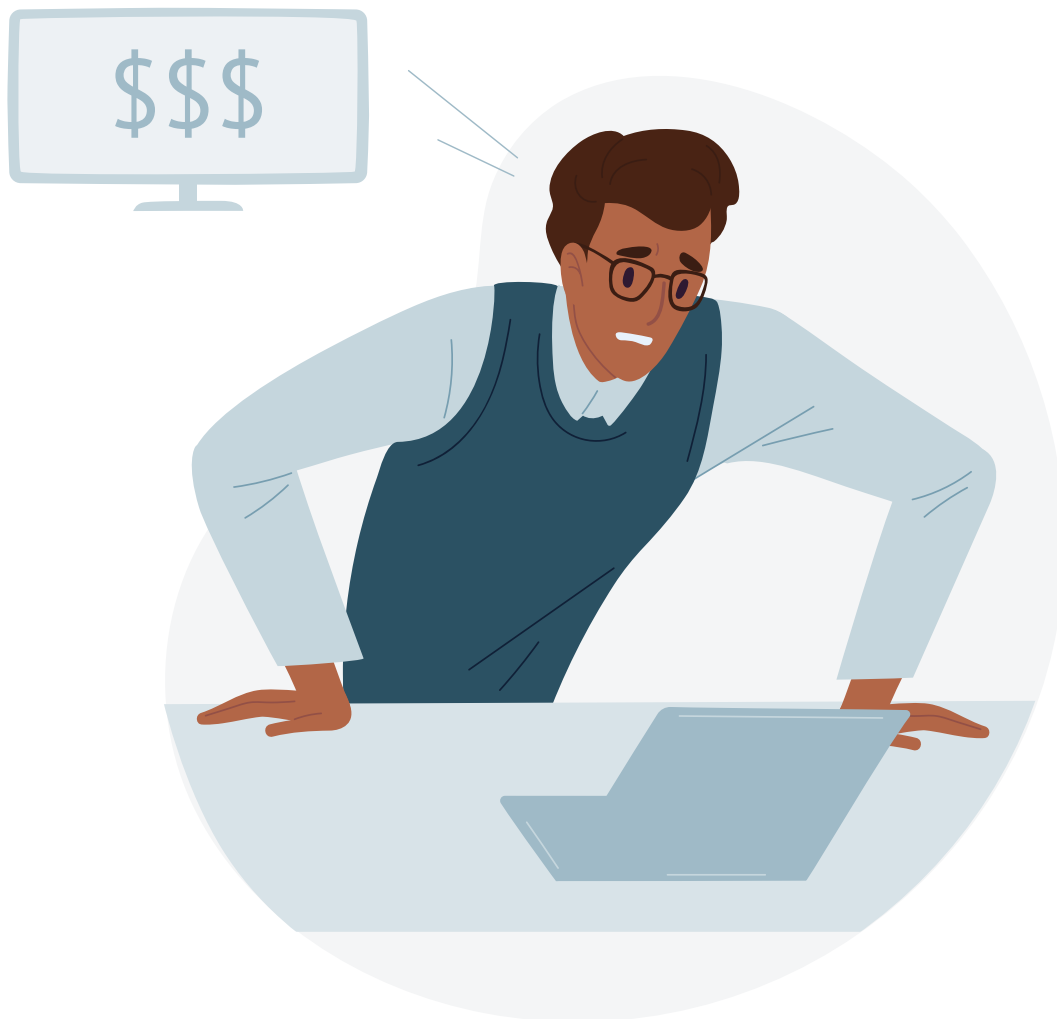


I bought a TV after seeing a Memorial Day sales ad. With 24 hours remaining, I did what any good ad makes you do: I reacted and bought it. After the TV shipped, I got buyer's remorse and started researching to see if I at least got the best price. I hadn't.

Not only were there better prices, but there were also better TVs. Had I spent time thinking through the decision instead of reacting to a sale, I may have spent my money a little wiser.

This goes far beyond TVs, though. Any decision you or I make, if not given enough time to think through it, may not lead to the best result. Reacting usually doesn't end well for TV purchases or your funeral business.

In fact, reacting might be the idle mindset's middle name. Unlike the ignorant mindset, those that are idle will change...eventually. However, instead of being proactive and changing to meet oncoming needs, they'll wait until absolutely necessary.

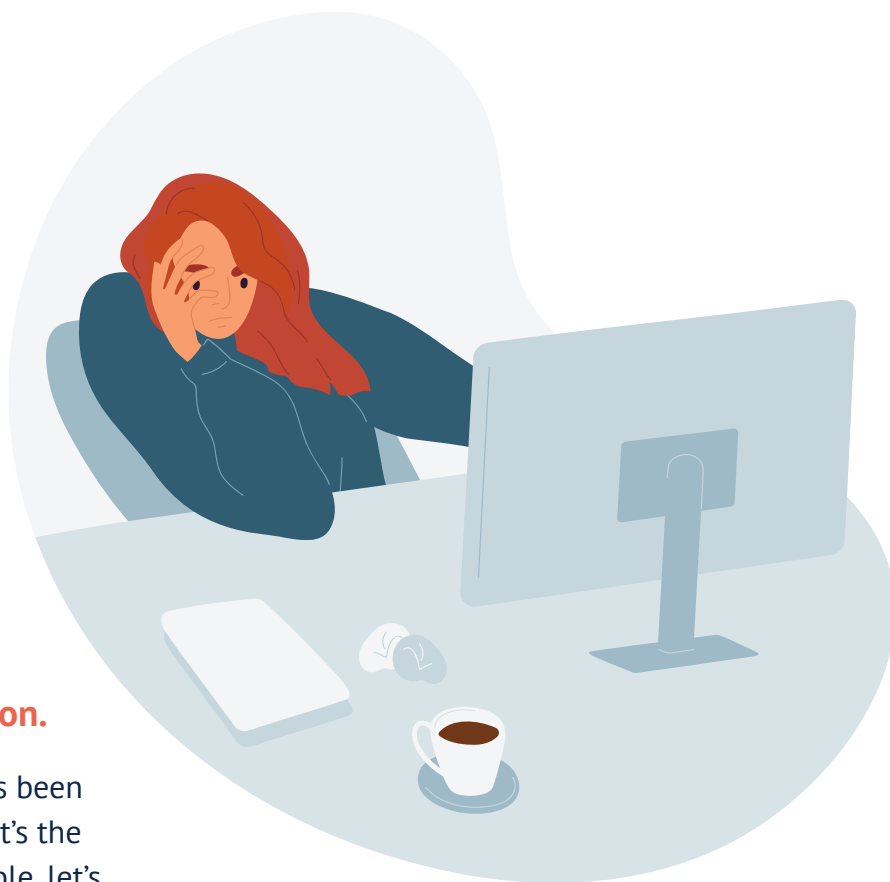


Traits of an idle mindset

They confuse method and mission.

For idle funeral homes, what's always been done has worked, so it's assumed that's the best way to serve families. For example, let's take the arrangement conference, a process that you may not have updated in your funeral home in 15+ years.

When the family comes in, they're seated in the same room, handed the same brochures, and asked the same questions. Whether it's the year 2002 or 2022, the process hasn't changed. You might say, *"Well, my method works, and I haven't had any family complaints."* While that might be true, you shouldn't have to hear complaints to know your families have changed. Over the last 20 years, every generation has gone through dramatic shifts. If your processes haven't adjusted, you're probably not meeting the needs of your ever-increasing digital families.



They're reactive to change.

To my surprise, some funeral homes didn't even know they had a technology problem until the pandemic hit. As many states went into lockdown, funeral directors suddenly had no way of connecting with families, getting signatures, or having more than a handful of people attend a service. What hadn't been a problem before left many scrambling to catch up. It's not that funeral homes didn't have the ability to adopt new technology; they just didn't think they'd need it to connect with their families.

The problems with an idle mindset

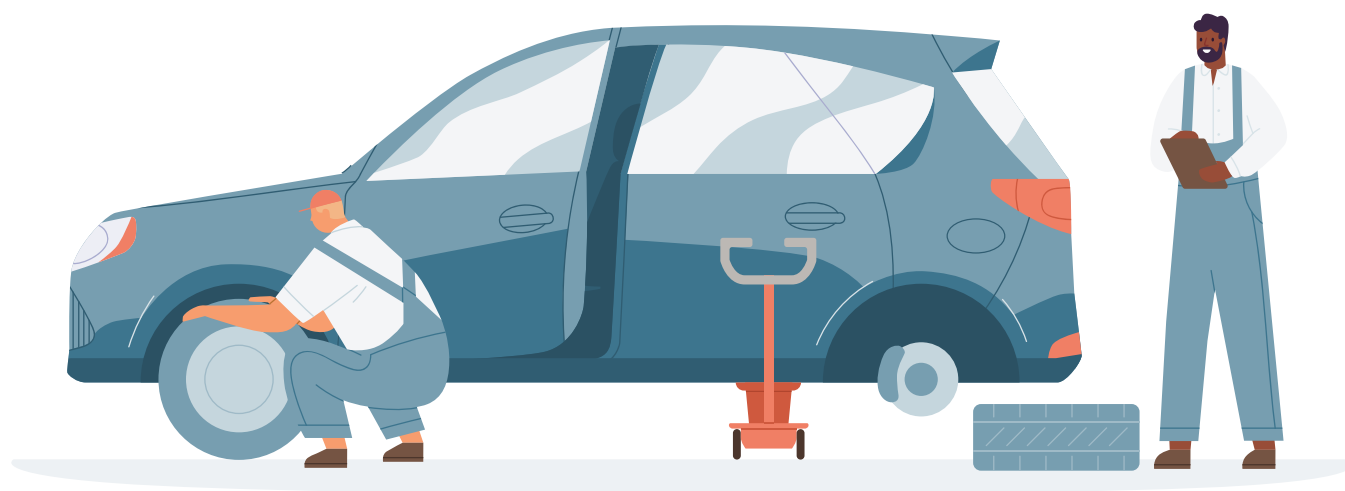
Reacting to change rarely produces the best results.

If you're constantly waiting until the last minute to change, then you're having to react instead of having the time to carefully plan out the best solution. If you don't have the time to think out the best solutions, you may be forced into a decision that, at the moment, seems like the right one. But given enough time, you may have come up with something even better.

What's worked today doesn't always work tomorrow.

Have you ever seen a car driving down the highway on a spare tire? While they were fortunate the first time, what happens when that spare goes flat? The driver would spend money for a tow and the new tires. Many funeral homes are living on a spare tire of outdated equipment and technology. It may work now, but what happens when your computer crashes and you can't get your files back? What happens when a family request is outside of your norm?

Today's families have already changed and continue to do so. The goal is not to keep up or even stay ahead, but to anticipate the family's needs before they even know they need them. To do that, we'll need to shift to a proactive mindset.



The innovative mindset:

Seeing problems as opportunities





Sunset Memorial Park in Albuquerque, NM wanted to create more brand awareness and draw people to their cemetery. The challenge was, how would they get people to come to a cemetery with no one to bury?

Sunset Memorial Park teamed up with brand agency McKee Wallwork + Co. to find a unique solution. While researching, they discovered that 1 in 5 families had ashes in their home they had never scattered or placed anywhere. Sunset Memorial, with the wrong mindset, could have easily created marketing materials and a campaign around selling more urns. Instead, they created an event called Scatter Day. Sunset Memorial Park opens its cemetery to the public and allows anyone to scatter their family's ashes there. They now attract over 1,000 people a year.

It wouldn't have been my first idea to host a free event that wouldn't bring in any immediate revenue. Thankfully, Sunset Memorial saw things differently. Because they had a different mindset, they had a major impact on their community and the families that were given a chance to grieve and give their loved ones a final resting place. As a result, the Sunset Memorial team has received national recognition, and hundreds of funeral homes across the country take part in their own Scatter Day in their communities.

Funeral homes, like Sunset Memorial Park, with an innovative mindset are not trying to fight change. They're looking for ways to change. Even if things are working, they're constantly asking, *"Yes, but how could it be better?"*

Traits of an innovative mindset



They're focused on the mission.

My first Netflix rental was a DVD. For those old enough to remember, you could choose from multiple DVDs and have them shipped to your house for a standard monthly subscription. Given how well DVD and Blu-ray sales were at the time, Netflix would not have been seen as foolish to hold tight to that business. Instead, they anticipated a “digital” change and invested heavily in their video streaming services. As a result, their number of subscribers climbed from 8 million in 2007 to over 208 million in 2022 (2). Mission was more important than the method and way they had always done things.

In a similar way, innovative funeral homes are not tied to their method. Their eyes are on the mission to serve families in whatever way they can, even if it means change.

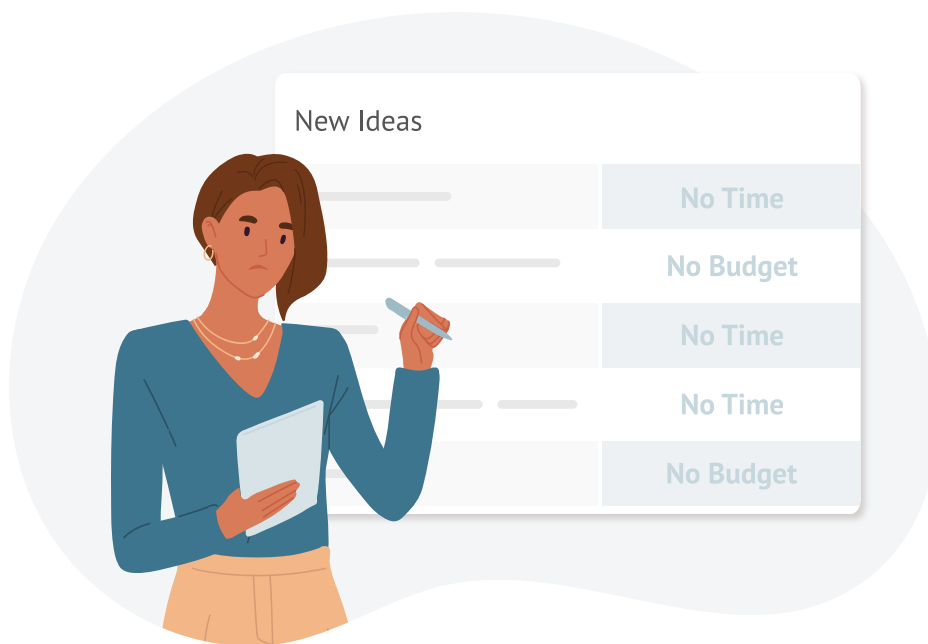
They're proactive.

So much has happened over the last few years that it can feel like anything more than “treading water” is a miracle. For the innovative funeral homes I’ve talked to, change is just a part of the process, and their staff are used to moving quickly. To be fair, being proactive doesn’t always mean you’ll get it right every time. Even Netflix didn’t do that (ever heard of Qwikster?). But it does mean you’re trying. Anticipating families’ needs will prepare you for anything, even changes you didn’t see coming. Besides, it’s less scary to fail at something new for the future than when you’re depending on it in the moment.

(2) Demery, P. | Jan 24, 2008. (2016, November 1). *Netflix sails past \$1 billion in e-commerce revenue in 2007*. Digital Commerce 360.

The excuses





“We don’t have the budget.”

A common objection I hear is that you need money to innovate. And a lot of funeral homes don’t have extra cash laying around. This might be true if you’re creating your own software or throwing a large event. But there are a lot of ways to be creative that don’t cost a thing. I met Pat Lanigan, a funeral director near Pittsburgh, who wanted to do something different than the typical cemetery service for Memorial Day 2018. His idea was to attend the event, not as himself, but as one of the fallen heroes being remembered. He found clothing that matched the era and prepared a short speech. It was a simple idea that made a lasting impression on those in attendance. Pat even received recognition from the National Funeral Directors Association (3). Innovative ideas don’t have to be expensive.

(3) Lanigan, P. | (2018). *Memorial Day*, May 28, 2018. Published in NFDA.

“We don’t have the time.”

Another objection I hear is that innovative ideas mean original ideas that take a lot of time that funeral homes don’t have. While good ideas can take time, you don’t always have to create new ones. As my former professor used to say, “Some of the best ideas are stolen ones.” She wasn’t talking about plagiarism. She meant that many already have great ideas. How could we take those ideas and use them to fit our needs? That’s what Spring Grove Funeral Home in Cincinnati, OH did. Their Scatter Day attracts hundreds of people a year. Do you think they’re concerned they weren’t the first? Doubtful.

While innovation may not cost anything or require originality, it does take work. Innovation isn’t something you achieve and then don’t have to worry about anymore. It isn’t something that only requires one part of your business to change. Innovation is an all-in, constant process.

Adopting an innovative mindset






Understand **your motivations**

I can't cover everything you'll need to be innovative, but there are 2 crucial places to start. Regardless of which mindset you are, these areas will help you become more innovative in your decision-making and the way you serve families.

By becoming more self-aware, we can see our true motivations and why we do or don't do certain things. So, what's your motivation? If you're like most funeral directors I've talked to, the answer will be some variation of "to serve families." I'd hope so, otherwise, you're in the wrong profession. Now, here's a follow-up question: do your actions match your motivations? In other words, do the business decisions you make match your desire to serve your families that are becoming younger and more digital?

If you answered no, that's OK. Part of the struggle is to acknowledge the disconnect between your actions and motivations or, as I talked about earlier, your mission and method.

An innovative mindset will say, *"Regardless of whether my current actions reflect my motivations, how can I do better?"*



The best thing leaders can do to improve their effectiveness is to become more aware of what motivates them and their decision-making.

Anthony Tjan
Entrepreneur & Counselor to CEOs



Understand how change **affects your business**

If you've ever bought a new phone, you know it's not as simple as just getting the phone. When I got my new iPhone, I forgot that I also needed a new case and screen protector. On top of that, I had a lot of photos on my old phone and needed an easy way to store them, so I got extra iCloud storage. Also, if you didn't know, newer iPhones have a built-in magnet, so our old car mounts didn't work anymore. Are you seeing the trend? One simple change can have an unexpected ripple effect.

Now replace "phone" above with any funeral home change. This could be a new TV, new software, or even a new process. Any of it will have an impact much larger than you probably realize. For those that want to innovate, understanding how change works and impacts your business is crucial.



In 1965, Harold Leavitt, a professor at Stanford University, created a model for understanding the relationship between change and 4 business categories: structure, task, technology, and people.

Structure

Your rooftops, whether you are family or corporate-owned, and your market will all play into the structure of your business.

Task

These are any processes you use to run your business like how your funeral directors do arrangement conferences to where you file the contracts.

Technology

What technology does your funeral home use? Computers obviously come to mind, but credit card terminals or software are also considered technology.

People

This is your staff and the people that will be the most affected by the change.

He argued that while these four categories exist independently, they're very much affected by each other. I'll focus on one area for now: how technology changes impact your structure, tasks, and people.

Technology and structure

As you bring on new employees, add rooftops, or update your service offerings, the structure of your business should change with it. For example, some funeral homes have added crematories or rooftops. Those are big structural changes that require big updates to your technology and the way you do things. The technology you may not have needed before becomes an absolute necessity between staff and locations.

Technology and tasks

Technology can solve problems for unhelpful or complicated processes, saving your staff from having to think of one more thing. However, some use technology as a “band-aid” than an opportunity to change. When processes begin to fail, technology is brought in to make

processes more efficient when they were never efficient to begin with. “Forcing” technology into a process is usually a recipe for disaster. Not only will your people become frustrated, but it can also disguise the real problem. The process itself or the mindset, not the technology, may be what needs to change.

Technology and people

Implementing new technology, no matter what it is, will impact your people in 1 of 2 ways. It will either help them to do their job better or hinder them. Your people are the ones most impacted by technology changes because they’ll be the ones using it. So, picking the right technology is not the most important part. Well-trained and prepared staff who understand the value of the new technology will be what determines its success. What was initially intended to help your people save time and thrive could become their greatest source of frustration if you skip training.





Working at Passare, I've seen this a lot. Funeral homes get excited for Passare and can see the value and benefits. But what many fail to do is prepare their staff and get people ready for the change that is about to happen. Now, instead of being proactive and learning the new features, they spend their time reacting to their staff and frustrations.

That's actually why Passare started our Launch Plus, Premium, and Support Premium services. We need to think about change as innovators,

anticipating the impact it will have on all aspects of our business.

To be innovative, understanding change is just the beginning. For innovators, change is not just accepted but embraced.

Now, I want to give some industry-specific examples of ways you can cultivate more innovation in your funeral home.

Sources of innovation





It's hard to come up with ideas on your own. Here's a short list that might inspire you with ideas to use in your funeral home and community.

Attend local or national conventions.

Connecting with fellow funeral directors can be one of the best ways to find inspiring ideas in your own backyard. Use these times as opportunities to see what others have tried and what you may be able to bring back to your funeral home. Attend presentations that you might not think you need but sound interesting. I attended an embalming seminar even though I don't embalm. I got more creative ideas from that one seminar than dozens of others that might have been considered more appropriate for my role.

Find ideas on social media.

While you may not be on the latest social media platforms, a search for "funeral home ideas" on Pinterest or Google will produce a treasure

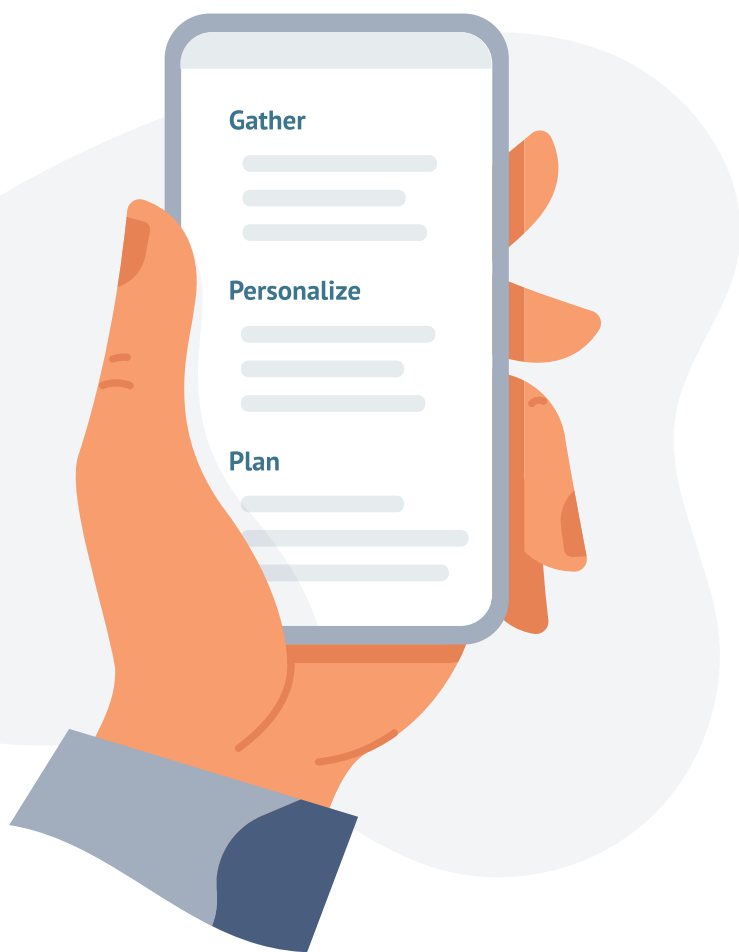
trove that'll take days to go through. A word of caution though: give yourself a time limit. Scrolling through ideas is great as long as you do something with them. Spend an hour a week looking for ideas, write them down, and then put them into practice.

Host or participate in your own event.

I already mentioned Scatter Days, which would be a great way to get your community involved with your funeral home or cemetery. Other examples I've heard are Shred Days where the community brings boxes of documents to be shredded for free. If you're not ready to host your own event, see if you can participate in one. I know plenty of funeral directors that speak at local events about preplanning or coordinating with other end-of-life specialists. Start by thinking through the next local or national holidays and how you can create value for your community.

Update an existing service.

As I mentioned above, the arrangement conference is a great place to start. I'm not suggesting you change everything or make your whole staff try something new. Start small. Ask your most change-conscious funeral director to incorporate a new script or include technology like Passare's Planning Center. Then get feedback and make a few more changes until you have an experience that is beneficial for you and your digital families.



Offer new services.

Are there services you've never offered before? One funeral home offers a photographer to families. This sounds like an odd thing to suggest to a grieving family. What this funeral home realized that I didn't was that families typically gather for 3 reasons: weddings, reunions, and funerals. For some, a funeral may be the first time an extended family has all been together in years. Offering a photographer may be fulfilling a need that the family didn't even realize they had.

Change your process entirely.

There are times when a simple update won't do. You need a complete update. Some funeral homes have done just that with the way they talk to families and share the value of a funeral service. For example, it's no surprise that cremations have been on the rise, and that impacts your bottom line. But does it have to? Patrick T. Lanigan Funeral Home and Crematory, Inc. in Pennsylvania noticed this trend and changed the way they asked questions. Now, when a family requests a cremation, their team asks, "What kind of cremation would you like?" This gives their team a chance to talk about the value of having a service even if the family plans to cremate.

These ideas are just a start. The more research and innovative thinking you do, the more creative ideas you'll find.

What would **your** replacement do?



“All organizations are perfectly designed to get the results they get.” Arthur Jones, former Procter & Gamble executive

You may be planning on retirement or just starting your career. In either case, I want you to ask a question anytime you find yourself in your old mindset or way of thinking.

“What would my replacement do?”

Everyone falls into the trap of taking the path of least resistance or just doing what’s already been done. But this question, as simple as it sounds, can put you in a different frame of mind. Imagine if someone were coming in tomorrow to take your place and sit in your chair. What

would they think of your processes, technology, or the way you interact with families? Would they change anything? If so, why not just go ahead and change it now?

Change is hard. But without it, your business will likely continue down the same path of results, good or bad, that you’re experiencing right now.

So, what can you do today? As I’ve covered, the first thing to change is not your merchandise, your processes, or even your technology. Change your mindset from ignorant or idle into one that is thinking ahead, proactive, and always innovating.

We help funeral homes innovate

I can't give you an innovative mindset. I would if I could. But Passare is well equipped to help you on the path toward innovation. We're here to support you in any way we can, from resources like this one to our case management software to help you manage your business and connect with families.

For more information about Passare or how it can help reshape your business, check out our website or give us a call and see for yourself. Your funeral home might be the next one we help innovate.



About the author

Chris, Director of Content, is passionate about helping funeral homes find innovative ways to manage their business and connect with families. He lives in Abilene, TX with his wife and two very active boys. If he's not working, he's probably camping.



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