Expanding Your Cemetery's Offerings

— by Chuck Sornig and Kim Schooley

Prospecting and Sales

Cemeteries can be sustained and maintained with escrow funds alone, but improvement and change are dependent on the addition of NEW revenues. The new revenues in a parish or diocesan cemetery are likely to come from a family member, or by referral of a friend in the congregation. In order to garner the necessary revenues for cemetery development, it is important to cultivate interest within the parish community by developing a dialog with the families and parishoners.

As an example, ***"The Cemetery Manager"*** software by TechniServe includes a *Contact Management* module that provides a way to add the name of next of kin or even a walk-in that may become an interested prospect as you make additional contacts with them. With the ability to query your contact database, your cemetery can accumulate prospect interest, provide follow-up letters, cards and emails to all prospects for any of your marketing campaigns or community projects.

For example, perhaps you are building a new mausoleum. In your marketing plan for selling the mausoleum crypts, you want to do a preliminary notification to the relatives of people already interred or entombed within the cemetery. Instead of relying on word of mouth or the weekly program, the software will allow you to contact these loved ones with letters, cards, emails, etc., quickly and efficiently using your current staff and resources. Whether it's new mausoleum construction or a flower campaign for Mothers' Day, the software enables you to customize letters or cards to interested contacts.

Heritage Preservation

Cemeterians are keepers of family heritage. Catholic cemeterians, as members of the diocese, have a special responsibility to preserve that heritage. Many times there is a common ethnic interest, but there is always a common faith interest. One needs only to chat with a Catholic cemeterian to know they are profoundly motivated by their common faith with their community.

How best to preserve the community's heritage? All available information should be collected as early as possible, and the client should be engaged to partner in the heritage preservation effort. There should be ability to add, amend and validate the loved one's record as information is gathered. With an accessible medium and a collective effort, the heritage record can be made more complete.

By facilitating heritage preservation, the cemeterian will engender goodwill within the faith community, and also in the larger community as the client shares their experience with friends and family members.

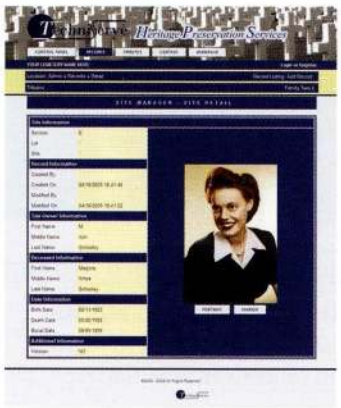
Recently, Warren County Memorial Park, a privately owned cemetery, using a *Heritage Preservation Services* program began promoting their Cherished Hearts Family Heritage site. By offering a public search of family information, they are providing their families with new services that include the ability to create an online family tree or memorial tribute. By increasing the services to their families, they are also able to increase revenue with the family tree and memorial tribute features while expanding the historical information available to the community.

All these new features which serve as potential revenue sources are controlled by the cemetery administration and nothing goes live to the site without review and approval by the cemetery. This protects both the family and the cemetery.

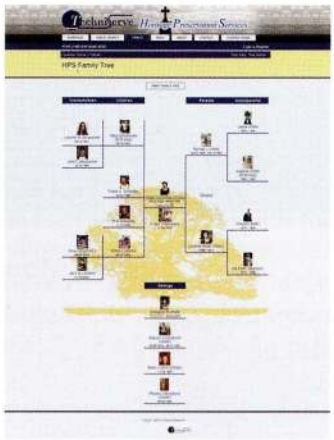
Client Record and Data Searchability

It is terrific when we have a robust list of clients and prospects, but that list can become rather burdensome if we

Burial Record Information



Family Tree



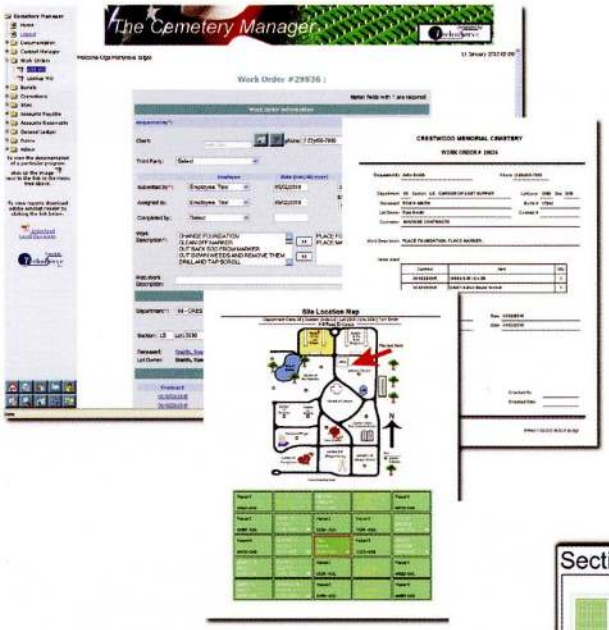
don't have our data organized, available and easy to find and sort. It is frustrating for both the client and cemeterian when the loved one's contract, interment right, or burial location is not readily available.

Burial cards had their day, but they are an impediment to effective customer support now. The grieving loved one is looking for immediate and accurate information. When we delay providing the response they seek, or worse yet, give them inaccurate information, we jeopardize our relationship with them.

A properly developed database can allow you to offer quick lookup for burials, current pre-need customer items, etc. without having to sift through hard copy files.

We all want to increase our business with very little effort, right? One way to do this is to use the electronic data you have available to offer historical/genealogical research via your Website.

As the site is researched, it can be designed to tell those looking at the information about possible sites available near the deceased they are visiting or to remind them of upcoming events such as holiday remembrance services. In addition, on-line maps can be made available via the Web to help those coming to visit find their way around and eliminate the excess time spent looking through burial and lot cards or section maps for available space, burial locations and directions.



Data Continuity

When searching for software, it is important to look at how the data is stored and maintained for easy access. If you look up a lot owner in the system and they own in more than one section, the owner file should reflect both locations as well as information on who is buried in the location or if it is reserved.

Is there a marker on the site or are there confidentiality restrictions that need to be followed?

If the family mentions they would like to purchase something in the future, for instance, a mausoleum crypt or a family monument or even a small item like a Mother's Day bouquet or a grave blanket, these items should be easily noted in the owners contact file and used to help increase revenue by creating a tickler file to remind you to contact them again on a certain date or time of year.

When St. Mary's Catholic Cemetery, started looking for a new provider to replace their outdated software they did their homework. They attended the CCC Convention and researched various supplier members. They checked the Web for other options and in the end they selected ***"The Cemetery Manager"*** software and TechniServe's support services to help improve their operations. Some of St. Mary's Cemetery records were available on an older database platform and were converted for use in the new system. Other records were only available in hard copy records or from genealogical research. Based on the volumes of records dating back into the 1800's, St. Mary's and TechniServe developed a plan to scan the historical plot cards and cross reference these to the database of cemetery locations.

In addition, volumes of genealogical research records were scanned and added to ***"The Cemetery Manager"*** files as searchable files.

Contracts, perpetual care requirements, monthly invoices, accounts payable and financial statements are now part of the daily routine of the cemetery staff, and future plans include a cemetery Website and possible mapping features.

Trusting and Perpetual Care Compliance

Today's cemetery owners are charged with maintaining various types of trust records: Perpetual Care, Merchandise Trust, Pre-paid Funeral Funding, Casket Trusts, Vault Trusts, Pre-Construction Trusts. While regulations vary from state to state, all cemetery managers and owners are legally and fiscally responsible for tracking the trust requirements, payments made to the trust, withdrawals from the trust and delivery, upgrades and cancellations to items designated as trustable.

A modular approach to the *Trust Accounting* allows you to track your requirements based on the requirements within your state.

Perpetual Care Trusts typically are based upon a percentage or fixed fee based on the sale of items requiring ongoing care and maintenance (ie: gravesites, mausoleum, crypt and niche spaces, etc.) and,

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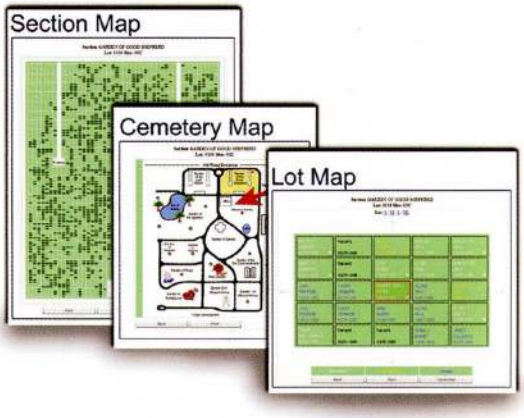

are as named, for perpetuity. Withdrawal of the principal is not allowed. The amount required is maintained in the product files and can be changed as requirements change. However, past rules and regulations are adhered to for prior sales. Perpetual Care deposit reports are available and can be generated in various ways, including by sales or payment date range, paid in full date.

Merchandise Trust, Pre-paid Funeral Funding, Casket, Vault and Pre-Construction Trusts are designed to protect you and your clients. Rules and regulations vary by trust type and state, but their intent does not vary—the intent is to ensure the client's investment in the products purchased is protected and available when the product or service is needed in the future.

Like the perpetual care escrow, the amount required for trusting is maintained in the product files and can be changed as requirements change. However, past rules and regulations must be accommodated for prior sales; these types of programming changes are made as the requirements change.

"The Cemetery Manager" is unique in that we create the trust reports to assist cemetery owners and state or corporate auditors. Some states require individually designated trusts by client and, while typically deposited to a single fund, the deposits, withdrawals and interest earned are tracked by individual and may or may not require annual interest reports or 1099's be issued to clients. Cancellations, Deliveries, Product Upgrades are all tracked and will automatically update the trust reports. For protection of the cemetery, all changes to the trust records are automatically recorded, allocated and preserved in financial and historical files to maintain system integrity and give you peace of mind.

Financial Management

Whether you report to the parish or diocese, you have a need to report your cemetery receivables and payables. If that requires you to do time-intensive reconciliation, there is a better way. Software has been designed so that all your entries or inputs during a month are readily allocated and reportable. Once input, the entries are easily displayed in a report that is integrated or exported to your financial application.

Properly managing and recording financial records eliminates time intensive reconciliation of accounts and you can view the entries posted to the general ledger at any time. By posting data continuously within the payables and receivables, including payments received you will improve your financial integrity for all transactions, have readily available reports for payables and receivables and be able to know your cash position on an ongoing basis. For security, tracking and audit purposes, all data and related changes are retained within the system with time and signature stamps recorded for each change to the fiscal transactions.

Knowing your software provider understands the workings of a cemetery from a hands-on point of view can be an

added benefit when dealing with both a parish cemetery or a larger, multi-location cemetery organization.

Detroit Memorial Park Cemetery Association (DMP) has three cemetery locations as well as an additional business. They rely on ***"The Cemetery Manager"*** for all their day to day operations. When CFO, Tib Tsadik, decided to join the TechniServe Family in 2001, ***"The Cemetery Manager"*** was using an older platform and was not Web-based.

The DMP management and staff have been instrumental in offering suggestions and improvements as we moved into the Web-based system. DMP utilizes the majority of the modules available within ***"The Cemetery Manager"*** solutions including all Financial modules, electronic file cabinets for scanned documents, marketing and contacts, trust reporting and tracking, perpetual care requirements and reporting, sales commissions with split commission and override features and multi-level product prices based on sales location.

TechniServe's partnership with the DMP family of cemeteries, includes a facilities management agreement and allows for staff assistance and ongoing support on a regular basis. We also developed the DMP public Website, *www.detroitmemorialpark.com* that includes an on-line order form for seasonal decorations, and they recently started including the QR-Bar Code to allow "smart" technology users a direct link to their site on all their advertising.

Staffing

Cemeteries large and small appreciate an integrated approach that includes:

- Single entry input which eliminates duplicate work and provides an easy work flow pattern to ensure that data is collected properly;
- Desktop auditability provides assessment of employee work volume and accuracy and allows for review and changes by management before final approval, if required;
- Remote access allows for input and search without commute to office. This feature alone has saved cemetery managers and owners countless hours of frustration.

By allowing remote access, managers can quickly respond to calls no matter where they are, as long as they have an internet connection available; no more rushing to the office on a weekend to look up data for funeral home requesting information, to take a burial order or lookup what a family has purchased pre-need. Online access is safe, secure, easy to use.

Kim Schooley is VP/COO for TechniServe, Inc. Chuck Sornig is the Business Manager/Marketing Director. They may be reached Toll Free at 855.832.7378 or at 248.989.0100. For the past seven years, TechniServe has been renovating their Cemetery and Heritage software. The renewal of the software, while taking advantage of the latest technologies, has been revamped from the perspective of Cemetery/Heritage Managers.

Kim Schooley, a logistics and software engineer, and Chuck Sornig, a former cemetery owner and senior consultant for cemetery clients at TechniServe, created software that can support all aspects of cemetery management. You may try their online demo at *www.cemeterymanager.com.*

Explaining the TechniServe Service Pledge

Chuck Sornig explains, "At TechniServe our motto has always been — *'It's the Service that makes us better.'*" TechniServe does not sell its software directly to cemeteries with the "It's yours now, learn how to use it" type service you may get with most "canned" software products.

According to Sornig, they license the software directly to cemeteries on a contract basis for a minimum period of time, based on size, usage and level of service required by the user. "We assist you and your staff with the initial system set-up including: site creation, product and pricing modules, G/L Chart of Accounts and Financial Report Formats, Vendor set-up, Open Payables and Receivables, etc."

Additionally, the license agreement includes a designated amount of time for system changes and enhancements to make ***"The Cemetery Manager"*** the cemetery's management tool.