

# Ask The Expert

[Industry leader]

## Finding Solutions, Growing Success

Q&A with Lori Salberg, senior business development consultant, Johnson Consulting Group

### ■ Summary

**Lori Salberg has spent a very busy 17 years working in the death-care field. Starting her career as a family service counselor for the Catholic Cemeteries in San Jose, California, Salberg has worked as a manager at a combination operation, as director of administration and information technology for Catholic Management Services and as vice president of sales for the cemetery software company Plotbox. In December, she joined Johnson Consulting Group as a senior business development consultant. We spoke to Salberg about what she has learned during her career and how she plans to use those experiences and skills at her new job. *Steve Cronin reports***

### **What attracted you to the role at Johnson Consulting Group and what are you hoping to accomplish?**

Johnson Consulting Group has one of the best reputations in the industry for being trusted and experienced advisers to clients. Tom and Jake Johnson are very well respected, and the consulting team they have put together is nothing short of impressive. I was attracted to being part of that team. When Jake and I started talking about a business consulting role, and I learned about all of the services Johnson offers, it was a no-brainer. I know that most cemeteries and funeral homes are struggling with the shift in consumer demand, service expectations, and with changes in technology. I've been talking about the changing consumer for years. At JCG, my goal is to find out what is keeping business owners and managers up at night and then customize solutions for their unique business. No one else does this better than our team. That is exciting.

### **You have wide and varied experience in your career, and you have**



**Lori Salberg**

### **primarily worked for and with cemeteries. Is making the transition to working with funeral homes difficult, or do your earlier efforts give you a perspective others might not have?**

I certainly have a learning curve not being a licensed funeral director

or embalmer. I have managed a combo with a cremation center, so I am familiar with general operations of a funeral home. That combo did 450 funeral cases and 950 interments annually. We also serviced cremations for six rooftops. I learned quickly that it was about the people. Fortunately, I had a passionate staff, totally focused on serving their families. My job was simply to support them.

I learned early on that if you have the right people and if you can provide the right motivation with the right intention, then staff will be loyal, will work hard and will bend over backward to serve the families and each other. Nothing replaces that when it comes to satisfying and retaining customers. It also helps to drive preneed sales. I do believe that cemetery counselors have more of a business growth mentality than funeral directors, and I would like to be able to bring more of that mentality to funeral homes.

### **You started in cemetery sales and quickly became a top performer.**

## What did the experience teach you, and do you bring those lessons to your current post?

I loved selling in the cemeteries. I loved meeting with families, taking them on tours of the cemeteries, learning about their life stories, families and ultimate wishes. It is such an intimate thing, talking about death. I knew that if someone was willing to talk to me, then the sale was already done. In those early years, I soaked up stories, and then I shared them. I think that nothing replaces good stories. I built up a good arsenal of true experiences of people who did not prearrange their funeral and the consequences – as well as the people who did, and the benefits. I had tragic stories and funny stories, and I used them to relate to the people I was meeting in the moment. People want proof that what they are doing is meaningful and has value. We were required to be present at every interment we arranged. That was the best thing for me being young at the time. The big lesson is the reality that everything we do in all aspects of our lives makes an impact, even in the smallest form. The hope is that I make a positive impact every day. The goal is to help as many as I can before I die.

## As a sales manager, what did you learn about motivating your team and helping them to connect with customers?

Listen, care, serve. As a manager, I didn't say I have an open door, I really *had* an open door. I listened to the staff and truly cared about their needs and their weaknesses and their fears, and even their excuses.

I have never been a manager to drive numbers. I believe in putting together a good team and then supporting them. Good incentive compensation programs will motivate

## VIEWPOINT

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enough. When you can get the team to believe that you believe in them and you are all working for a higher purpose, then success is inevitable. I am a huge believer in Simon Sinek and in what he calls “The Why.” Motivate from the heart first. Care about each individual's success. Find ways to serve the staff. I hosted birthday luncheons for staff, brought in bereavement specialists, did a lot of team building. Most importantly, I gave them time to care for themselves. We do emotional work. For that reason, I always found it highly motivational to provide additional time off and reimbursements for sales staff to participate in spiritual retreats and/or continuing education. The purpose of this time was to show empathy and provide them with opportunities to learn to be more empathetic. It allowed the staff to learn to listen better, to show more care and serve more customers.

**You held several management positions that involved restructuring and redirecting efforts of the organization and staff. In your experience, what's the most difficult aspect of turning an operation around – and how do you address that?**

Staff resistance to change can handicap organizations. You can have the best strategies, the proven solutions, and the financial resources available, but still be crippled if you don't have buy-in from superiors and staff. You have to be all in. That means, make sure that everyone sees your vision and believes in it. If you own your business, then make sure you are all in for making the necessary changes. Then, get the people who work for you to buy-in too. It is never easy. It is a process. You have to have a tremendous amount of patience, and a thick skin doesn't hurt either. To get buy in, I use this process:

1. Establish why you are making changes.
2. Clarify how this will impact each employee. You may need to meet with each person individually.
3. Get staff to own their part.
4. Train well and make training personal and relevant. Some people will need more handholding. This is where the patience comes in.
5. Ask for employee feedback and mean it.
6. Keep everyone in the loop. The worst thing you can hear from staff is, “I don't know what they are doing.” Imagine how that attitude comes off to customers. You must

make sure that everyone is part of the journey and keep them excited about it.

**As your career developed, you also became heavily involved in digital solutions and products. In your experience, how do funeral professionals approach technology and is their approach helping them or holding them back?**

In my experience, many are not approaching technology nearly fast enough. Most organizations are struggling with adopting technology to reach customers and to be more efficient operationally. This question makes me laugh because in my travels, I've seen that 65-70 percent of businesses in our industry still use typewriters in some capacity.

I think we are failing in big ways on the efficiencies. I've seen organizations improve efficiencies by up to 80 percent by adopting software and practices involving technology. In some cases, I've seen up to 20 hours saved per week on administrative tasks. I think of the time savings and also the customer perception. You can have the slickest website in the world and then when you meet with the family, you take out your packet of paperwork and start filling it in by hand. Doctors don't even use prescription pads anymore. Why are we still doing this paper process? I know that consumers these days expect efficiency. We don't necessarily earn a lot of confidence by using these old paper processes. And, I could go on and on about the potential risk of errors.

business is going to pick up as we look forward to the next 20 years, but boomers think differently.

To embrace change, you need to get over the fear, get comfortable with being uncomfortable, and get out of your own way. If you are asking, 'Why should I change,' the answer is, 'because people are telling you what they want.' They need you to listen. We are seeing funeral homes go from 900-case firms to less than 500 in the last five years. Sometimes it is simply because someone else entered the market, and it is not always the low-cost provider. When Netflix started out, it offered to buy Blockbuster. We all know what happened there.

Like I said, sometimes change is inevitable. The organizations that embrace change and adapt will be the only ones to survive.

**If I was a funeral professional interested in working with you, what should I expect, and how should I prepare myself?**

You should expect everyone at JCG working to help you reach new levels of success. We are totally committed to finding solutions that will save you time, allowing you to focus on what matters. To prepare, I'd suggest that you need to be open to listening, learning, and evolving. Be willing to accept the insights and analysis our team of experts can provide. Most importantly, be ready to invest some time up front so you can save more time long term. If you need help understanding this concept, I suggest a TED Talk called "How to Multiply Your Time" by Rory Vaden. We know that most business owners and managers can do anything in their business. They simply can't do everything – and do it really, really well. •

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I like to describe the funeral industry as a flip phone to the rest of the business world's smartphone. I use this analogy in speaking at conventions and am often corrected. Our own industry members identify themselves as the rotary phone when it comes to technology.

That is frightening, considering that Americans spend an average of 7.6 hours per day online, 81 percent of all consumers read online reviews and 36 percent will not do business with a company that has even one negative review. Funeral homes have gotten much better at websites because there are some good suppliers providing templates and content.

**Your career has been marked by change and growth. What do you think the secret is for embracing and making the most of change?**

In the DISC assessment profile, I am a fairly high D (Demand), which means I am a risk-taker. For me, there is no secret, I think it is in my DNA. I find that many people in the funeral industry are C (Concise) or S (Steady) personalities. By nature, they do not like change.

To them, I'd say there comes a time when change is inevitable. There are many outside forces impacting our industry now, and we need to adapt or die. Honestly, we see the boomers coming and assume that