

## Undertaker's Mindset

I have been involved with deathcare businesses all of my working life. Over 100 years ago in 1913, my great-grandfather, William R. Egan, had the entrepreneurial drive to start a new enterprise – to be the local undertaker.

After graduating from high school and having a connection to funeral service, I followed in my Great-Grandfather's footsteps and became a funeral director at the locally-owned funeral home in Victoria, BC.

Both meanings of the term UNDERTAKER applied to my Great-Grandfather and to me...

### undertaker

Definition of undertaker:

- one who undertakes - one who takes the risk and management of business - entrepreneur.
- one whose business is to prepare the dead for burial and to arrange and manage funerals.

## Modern Deathcare Executive's Mindset

By honing my craft of being a funeral professional in a highly competitive market that had - and still has - the highest cremation rate in North America (92%) – and together with my entrepreneurial, strategic and innovative mindset, I was put to the test to remain profitable and grow in an uncertain deathcare market.

After receiving numerous requests from funeral professionals from the east for help to face challenges that we had already overcome - and with earning my Business degree in Entrepreneurial Management - I launched my "Funeral Futurist" consulting and digital marketing agencies. My goal was to assist funeral homes and cemeteries by providing thought leadership and results-focused solutions when embracing changing trends in deathcare.

The following information will showcase my critical-thinking skills, innovations and leadership abilities I have brought to deathcare providers across North America. I hope to be able to bring these skills and abilities to your organization soon.

## Core Competencies

### Business Acumen

- Strategic Planning & Execution
- Team Leadership & Collaboration
- Financials, Statistics & Analysis
- SOP Creation
- Conflict Resolution
- Internal & External Communications

### Funeral Strategy & Growth

- Client Journey Innovation
- Competitive Intelligence
- Online Cremation Arrangements
- Price Shopper Closing
- Online Obituary Promotion & Revenue
- Pre-need Growth

### Marketing

- Customer Relationship Management
- Demand & Lead Generation
- Digital Marketing & PPC
- Website Development
- Social Media Management
- Online Reputation Management

## Career Experience

**Funeral Boardroom, Funeral Futurist, and Funeral Gurus (Strategic Consulting, Marketing and Training) 2004 – Present**  
Chief Marketing Officer and Strategic Consultant

Execute end-to-end funeral firms' operations by serving as a fractional Chief Marketing Officer (CMO). Perform all marketing and advertising-related audits to ensure proper implementation of robust business strategies. Identify best marketing channels for appropriately responding to clients' messages. Foster close collaboration with funeral home owners on matters related to pros and cons of new technologies, structure strategic partnerships, explore new opportunities such as online cremation, create a system to cultivate online reviews, review direct mail pieces, and choose CRM system. Co-ordinate several live seminars, including Funeral Rock Stars, Funeral Marketing Blueprint, & Cremation Conference and oversee day-to-day logistical functions such as marketing, venue & catering, printing materials, and registering/presenting all topics.

*More specific details are listed below in the Featured Projects section.*

## Funeral Results Marketing (Digital Marketing Agency for Funeral Service)

2008 – 2022

Chief Executive Officer (CEO), Chief Marketing Officer (CMO)

Led development and execution of new marketing strategies such as Google-friendly obituaries and Get Paid-First online cremation arrangements. Facilitated virtual team members by establishing library of digital marketing standard operating procedures (SOPs). Steered efficient management of Google Ads accounts to promote business growth. Implemented Local SEO best practices /guidelines by evaluating business ranking on Google.

- Established and supervised key activities of digital marketing agency comprising eight remote team members across Canada, United States, and the Philippines.
- Enhanced team performance and efficiency by designing a library of 173 Standard Operating Procedures (SOPs).
- Fueled a Google Ads portfolio that achieved a CTR of 9.84% and ROAS of 14% through a collective \$6.7M ad spend.

## McCall Gardens Funeral and Cremation Services (Formerly McCall Bros. Funeral Directors Ltd.) – Victoria, BC

Funeral Director, Arranger, Embalmer, Preneed Sales and Management

High volume (800+ calls) firm located in Victoria, BC in a highly competitive, high cremation (92%) market. Performed all at-need roles within the funeral home and launched & grew a new pre-need program to a high 7-figure backlog.

- Arranged over 1,000 at-need calls.
- Embalmed over 500 deceased persons.
- Closed over 1,500 pre-need leads.
- Led the development of the first website in 1996 and all subsequent websites.
- Facilitated the implementation of Celebrant services and the role of the Funeral Emcee.
- Developed in-house call management database & form creation.

## Deathcare Trends, Discoveries & Innovations

- In the early 2000s, I created the “How would you want to honor your loved one’s life?” arrangement strategy when faced with the emerging trend of “No service by request” by client families and the “No Hidden Fee Guarantee” concept to build trust with price shoppers.
- Discovering that Online Obituaries on funeral home websites were not Google-friendly, I developed & launched a customized plugin to make our websites’ obits Google-friendly ([more details here](#)).
- In 2015, with Google’s search engine algorithm update Mobilegeddon looming, I was the first industry website developer to develop and offer “mobile responsive” websites over the less Google-friendly mobile versions of desktop website designs.
- I created the Website-assisted Funeral Arrangement process in March 2020 so arrangers could complete arrangements with client families without having to use Zoom. One client who implemented my system said that it worked so well that he would never go back ([more details here](#)).
- Proving my counterintuitive hypothesis of changing the order of the steps for online cremation arrangements to “get paid first” and then get the vital stats information and forms signed afterwards - this increased the completion rates of online arrangements - I prefer to chase someone for stats info than for a credit card number.

## Featured Deathcare Consulting & Marketing Projects

- Orchestrated and executed a highly profitable, multi-million dollar trust rollover coupled with huge public relations positivity.
- Conceptualized and recorded “Scientific Advertising for Funeral Homes” companion along with narrating Claude Hopkins’ “Scientific Advertising” classic ([more details here](#)).
- Engineered a 3-step Obituary Promotion procedure that helped a funeral home increase online floral sales by 24% ([more details here](#)).
- Quarterbacked and achieved a cremation provider’s plan to accelerate growth from \$0 to 7 figures in 5 years with just my Google Ads system and my e-commerce cremation website platform ([more details here](#)).
- Engineered a “Community Gives Back” process for funeral homes to filter and prioritize requests for donations through an application process and at the same time, promote community events through their blog and social media.

## Other Deathcare Experience

### Pre-need Highlights

- Crafted a 7 KPI Scorecard to effortlessly track the health and growth of Advance Funeral Planning programs.
- Orchestrated and propelled an advanced funeral planning program worth \$7.5M by managing mail/print/broadcast media, fostering trusted relationships with clients, and delivering live presentations while serving as Head of Sales and Marketing for McCall Bros.
- For three consecutive years, ranked within Top 10 in sales across North America for executing NSM's Monumental Life Plan and one year won # 1 Salesperson Award - all with having the most contracts signed and the lowest averages due to operating in the highest cremation market.

### Cemetery Experience

- Sold burial plots, cremation features, cemetery services, and monuments on a pre-need basis for both corporate and public cemeteries.
- Developed cemetery websites, created online marketing campaigns for cemeteries, and created training programs for digital marketing strategies for cemeteries.
- Contributed as the primary marketing consultant for a large, multi-property, public cemetery business plan.
- As a teenager, worked on cemetery beautification process resetting footstones plus cemetery grounds maintenance.

### Mergers & Acquisitions Experience

- Divested my digital marketing agency, Funeral Results Marketing to Jake Johnson of Johnson Consulting Group who is an industry leader in M & A.
- Worked with clients who were planning to divest their businesses in the near future to grow revenues through increasing contract averages and gaining market share, plus launching cremation arrangement websites to capture some of the "value customer" market share.
- Well connected throughout the deathcare industry in North America - especially with independently owned funeral homes that would be prime candidates for the acquisition pipeline.

## Deathcare Thought Leader

### Training Programs Creator and Presenter:

Through my Funeral Rock Stars live seminars, I created, promoted, hosted, facilitated and presented my Funeral Marketing Blueprint, Funeral Competitive Strategies Masterclass, and Cremation Conference programs.

I also created and marketed 4 online training programs to teach, train and support managers and staff:

- Funeral Manager Secrets: 4 modules (including custom Excel spreadsheets)
- Funeral Manager Blueprint: 7 modules (including 42 pages of worksheets, frameworks, checklists and scripts)
- Funeral Relationship Mastery: 3 modules (co-created with Todd Van Beck)
- Price Shopper Secrets: 6 modules (co-created with Mike Kubasak)

### Industry Podcast Host:

- Funeral Gurus
- Funeral Strategy and Marketing Show
- FuneralX
- Life & Times of Todd Van Beck
- Scientific Advertising for Funeral Homes
- Strategy Talks by Funeral Results Marketing

### Industry Publications Contributor:

- American Funeral Director
- APFSP's Compass
- Canadian Funeral News
- Funeral Business Advisor
- Funeral Home & Cemetery News
- ICCFA Magazine
- Mortuary Management

### Presentations:

ICCFA (2022, 19, 12, 11,10, 09, 08, 07) | TanExpo (Italy) (2018) | | OGR (2015, 12, 09) | NFDA (2013, 10) | ICCFAU (2012, 11) | FSAC (2011, 06) | FPC (2010, 08) | CANA (2007) | CCFS (2010, 07) | SIFH (2008) | Crematory Leadership 2016 | IFHV (2016) | IFDF 2014) | People's Memorial 2012) | LA County FDs (2012) | Ohio FDA (2011) | UFDA (2011) | SFLIC (2010) | LIC (2010) | OACFP (2010) | Tri State Northern Rockies (2010) | AFD (2009) | OFSA (2009) | NJSFDA (2009) | FDAKY (2009) | NYSFDA (2008) | Oregon FDA (2008) | IFDA (2008) | FSABC (2006)

- Plus created and presented 150+ training seminars and accredited CEU programs via webinar.

## Education & Credentials

**Bachelor of Commerce in Entrepreneurial Management**  
Royal Roads University – Victoria, CA

**Advanced Education and Training - Apprenticeship**  
Funeral Director and Embalmer – Burnaby, BC

## Certifications

**Google** – Google Ads Partner & Google Analytics | **Cremation Strategies & Consulting** – Crematory Operator | **In-Sight Institute** – Celebrant | **Academy of Professional Funeral Service Practice** – Certified Funeral Service Practitioner

## Leadership

### Deathcare:

- Board of Trustee Member (4-year term) - Academy of Professional Funeral Service Practice
- Funeral Sector Member – Funeral Profession Coalition Council of Canada
- Canadian Member – NSM Preneed Marketing Group

### Entrepreneurship:

- Member – Four-person Case Competition Team (Royal Roads University)
- Member – Internet Entrepreneur Panel for MBA and BCom Learners (UVic)

### Community:

- Worshipful Master (2 terms) of Confederation Lodge (Grand Lodge of BC)
- Elder (8 years) and Roll Clerk (3 years) – St. Andrew’s Presbyterian Church
- Head Coach (3 years) and Assistant Coach (5 years) – Victoria & Saanich Minor Hockey
- Assistant Coach (4 years) – Saanich & Peninsula Minor Lacrosse

## Advanced Computer Skills

Google Workspace (Email, Docs, Sheets & Slides) | Microsoft Office (Word, Excel & PowerPoint) | CRMs (Infusionsoft & Hubspot) | Communications (Slack, GoToMeeting, GoToWebinar, Zoom, Google Meet & Skype)

## Testimonials

**David McCall**, Chairman, McCall Gardens Funeral & Cremation Services

*“Rob have given us excellent service and innovative solutions to the challenges we have faced in a highly competitive cremation market. He has not wavered in his approach to finding a balance between successful client family relations and the needs of our firm. Whether it be marketing strategies or hints on customer service and messaging, he has excelled. He particularly knows the cremation customer’s expectations and mindset.”*



**John McQueen**, Former Owner, Anderson – McQueen Funeral Homes

*“Rob used to work with me as far as doing work for my funeral home when I had it and I attribute a lot of our great success and growth to the efforts that Rob put forth. He is definitely a guru.”*



**Todd Van Beck**, Funeral Educator & Historian

*“Heppell has the knowledge and experience to blend his admirable funeral experience and his unquestioned dedication to funeral service and link this vast treasure trove of experiential expertise to today’s Internet-savvy consumer. Heppell is a great communicator and he has helped to guide and mentor scores of funeral homes with the results being that his funeral home clients present themselves in an enhanced manner, in an ever-changing market, to capture more service calls. Heppell’s footprint on his client firms is proof of the adage that “Not all funeral homes are the same.”*