PLOTBOX

Serving Better Together.

The Ultimate Guide to Finding the Right Digital Transformation Partner

7 steps to success

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Welcome.

You have joined the growing numbers of deathcare service providers who understand that digital transformation is no longer a nice-to-have, but an imperative in meeting the changing needs and expectations of those you serve, and ensuring your long-term viability.

Procurement isn't a one size fits all. Whether you're a private cemetery, a local authority, a municipality, a religious organization, a not for profit, or anything in between, you may or may not, and to a greater or lesser degree, be bound to specific tendering procedures.

Fear not, this eBook has been designed with everyone in mind - the steps we examine can apply equally to anyone wanting to ensure they find the right digital transformation partner and seek confidence in their investment in a new solution.

So what is it?

Let's start with what it isn't.

What this eBook isn't

It's not telling you what your procurement or tender process should be, or is it a hard sell for any one deathcare management software solution or provider.

What this eBook is

No matter what your established procurement or tender processes are, this eBook is about providing strategies for finding the right solution, and the right partner for your specific needs.

We'll explore:

1. Goal setting and vision
2. Looking beyond price
3. Defining your system requirements
4. Researching the market
5. Getting the most from demonstrations
6. Shortlisting
7. Understanding partnership roles

1. Goal setting and vision.

Ensuring you get the right solution, and the right transformation partner for your specific needs, begins with clearly defining what it is you are setting out to achieve.

Therefore, one of the first and most crucial steps in the process is to set clear goals and objectives that, importantly, are clearly aligned with, or in service of the overall long-term goals and objectives of your organization.

This is essential for guiding your decision-making process, ensuring buy-in and accountability from key stakeholders, and ultimately, finding a vendor that perfectly complements your specific needs.

The decision makers

The decision to adopt a new cemetery management system isn't one to be taken lightly. Where an organization is overseen by a board for example, they will play an important role in the decision-making process.

With a remit that extends beyond simply approving the budget, it may be they who set the agenda in terms of overall direction and priorities - extending to actively participating in defining the cemetery's objectives for the new system. By engaging early on - whether a board or equivalent, you can leverage their insights to set strategic goals that align with your mission and values.

Setting your objectives

Whether you're a hundred year-old cemetery, a newly established green burial site, a state-of-the-art crematory, a local authority, or a funeral home combo,, you are unique, and your requirements for a deathcare management system will reflect those distinct qualities.

Before beginning the procurement process, it's vital to identify and articulate the specific objectives you aim to achieve with the new system.

Whether it's to upgrade and future-proof your software systems, streamline administrative and operational processes, protect your legacy, ensure business continuity, mitigate risk, enhance customer service, improve records management, become more data-driven, or aligning with your organization's new digital strategy, clearly defining these objectives will help to guide you throughout the entire journey.

Outlining your vision

Your vision is your north star, and to mix our metaphors, it acts as the compass that will guide you through the procurement process, with a sense of direction and purpose.

More than just technical requirements, it should encapsulate your broader values and aspirations.

For example, do you aspire to connect in a more meaningful way with your community? Do you want to become more environmentally sustainable? Do you want to attract the best talent?

Here's the rub: by establishing a clear vision, the procurement process becomes more than acquiring a new piece of software. It becomes a search for a partner who aligns with your own mission and values.

The right vendor is not just one who ticks the right boxes; it's one who shares your vision and understands what it takes to make your partnership a success.

2. Looking beyond price.

Financial cost is of course an important factor in the procurement process - some evaluation methods being predicated on price as a ratio to other factors, or in terms of shortlisting, used as a ranking system price scores for each response. And of course, there are valid reasons for that.

But, as the saying goes, cheapest isn't always best, and while appealing from a budget perspective, selecting the cheapest option may ultimately be a false economy, leading to significant drawbacks, such as compromised quality, lack of expertise, or inadequate support.

Consider who has the experience required to fully understand, appreciate and meet your unique needs; overlooking this can lead to critical factors that significantly impact the success of the project being missed and increase the likelihood of issues, such as costly rework, delays, or missed opportunities for growth.

As well as price, prioritize factors such as track record, ongoing customer support and training and scalability. After all, a well-aligned partnership is an investment in your long-term success.

Here are a few factors to consider:

Expertise and Experience

Look for a vendor with a proven track record across the industry. They're more likely to understand your specific needs and challenges, helping to ensure a smoother and more successful implementation.

Tailored Solutions

The right vendor will work closely with you to develop a tailored solution that aligns with your unique requirements. They'll take the time to understand your goals and your operational needs to ensure the new system is a good fit.

Customer Success

Choose a vendor that is genuinely invested in your cemetery's success, one who prioritizes customer satisfaction and offers ongoing support - ideally providing a dedicated Customer Success Manager to assist at every stage of the digital transformation journey - and beyond your go live date.

Scalability

As you grow and evolve, your system should be able to scale and adapt with you. Ensure that your vendor provides a solution that can accommodate your plans for future growth..

Training and support

Evaluate the level of support and training provided by the vendor. A vendor that offers comprehensive training and ongoing support ensures that your staff is empowered to use the new system effectively.

Long-term Partnership

Choosing the right vendor is not just about implementing a new system for short-term gain; it's about establishing a long-term partnership. Look for a vendor who is committed to collaborating with you in the long run, providing solutions, updates and enhancements that meet your evolving needs.

Remember: a return on investment isn't always about a dollars or pound note value. It's about much more than that.

3. Defining your system requirements.

In order to find the right solution, and ultimately the right partner, it's important to understand from the beginning what your new system needs to do.

We've talked broadly about goals and visions, but before formally entering into the procurement process, it's important to clearly define your requirements that address existing challenges or shortcomings and align with your objectives.

That's important for a number of reasons:

To maximize ROI

It will help to maximize your return on investment by being customizable to your meet your specific needs, leading to improved operational efficiency, reduced costs, and enhanced services, all of which contribute to a positive ROI;

To avoid over-engineering the solution

Without clear requirements, there's a risk of over-engineering the system, adding unnecessary complexities or higher costs. Conversely, under-scoping requirements may result in a solution that fails to address critical needs. Providing potential vendors with specific requirements helps to strike the right balance;

To streamline implementation and adoption

Clear requirements provide a roadmap for the implementation process. From the outset, your expectations are laid out clearly. Vendors can use these to design and configure the solution accordingly, streamlining the implementation timeline and facilitating user adoption.

So how do we go about defining our requirements? Here are a few ideas:

Engage your vendors

It may seem somewhat counterintuitive, but one of the first things you should do before entering a formal process is to engage with vendors (if permitted within your procurement process).

The reason for this is because, as customers...pause for a slightly odd sounding statement...we won't always know what we don't know. By that we mean, before addressing the market, we won't always know what's possible, and therefore what to be looking for.

By initiating conversations with vendors, you will gain valuable insights into what a new cemetery management solution can actually provide you with, as well as valuable feedback and suggestions that help to refine your requirements - keeping you focused on finding the perfect fit.

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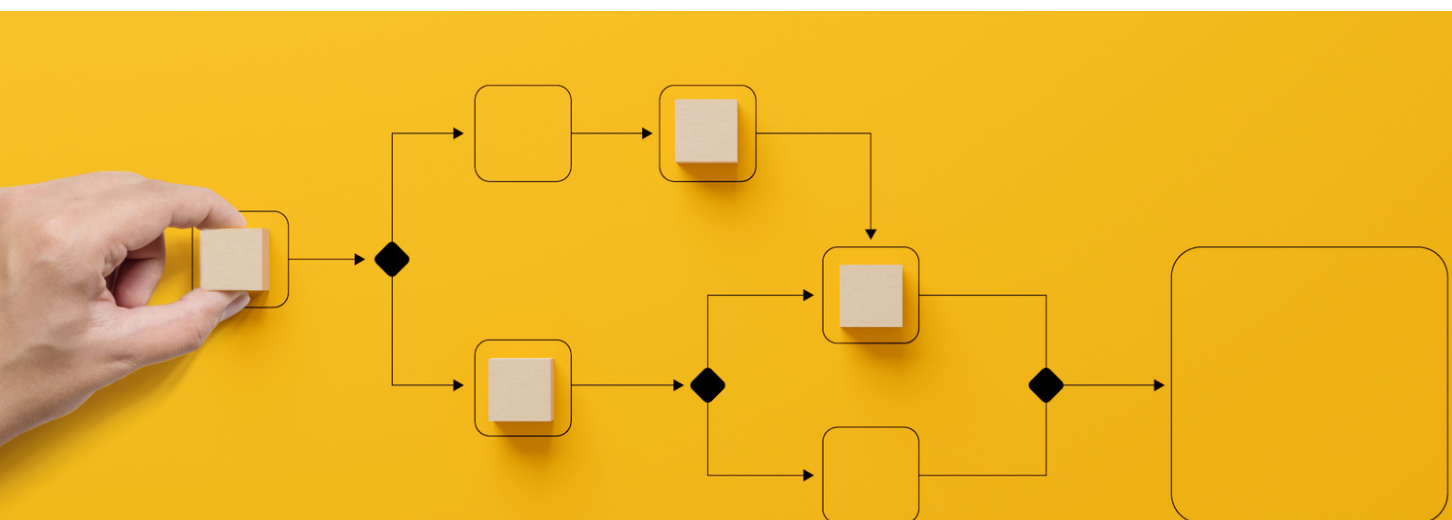
3. Defining your system requirements cont.

Here's some more food for thought:

Evaluate your current processes

Carry out a thorough assessment of your existing processes - what's working well, what isn't, where are there inefficiencies, bottlenecks or silos of information? From the minute you pick up the phone for a new interment to the renewal of contract - review everything, from manual tasks, data management and record keeping - how you handle deeds, plots, work orders, memorials, communication, and how and what you report on - consider the full gamut of your operation.

Gather staff insights

Involve staff from every department - speak to grounds teams, admin staff, sales counselors, crematory staff and other relevant personnel to gain a better understanding of the needs of your organization as a whole. What are their pain points? What's currently lacking? What are their must-haves? What would help them to carry out their roles most effectively and help them to provide the best possible customer service?

In this way you can help ensure that your new system is user-centric - remember, they're the ones who will be using the new system on a day to day basis.

Identify critical functional requirements

List the essential functionalities that the new system must possess to meet your unique needs. This may include features such as burial records management, plot mapping, scheduling, inventory tracking, financial reporting, memorials management and customer relationship management. If you use formal tender or quotation request documents, this may form an important part of your appraisal.

Consider Non-Functional Requirements

Non-functional requirements are also important. Look at factors such as system hosting, security, data privacy and compatibility with existing infrastructure. Your data is one of your most valuable assets, so it's important that your vendor is able to provide peace of mind and mitigate any potential risks.

4. Researching the market.

There are a number of vendors and solutions on the market, so how do you give yourself the best chance of finding the one that's right for you? How and where to start in your search for your new partner?

Doing your research ensures that your procurement process is strategic and well-informed. So how do you go about doing it?

Industry Conferences and Events

Industry events and conferences are a great opportunity to engage, to learn and to share.. And vendors love them because it gives them a chance to get in front of potential customers.

These gatherings, often run by professional industry bodies, provide a great opportunity for you to meet vendors, to see what they have to offer, to view demonstrations first-hand, and to learn about the latest solutions available on the market.

Ask as many questions as you can, and if you forget to ask something important in the moment, you can also follow up. Speaking face to face can also give you a better sense of whether they'll be a good 'fit'. Trust your 'gut feeling'.

Online Research and Reviews

Use the power of the internet to research potential vendors. Using keywords or phrases such as 'cemetery management software', 'crematory software', 'cemetery solutions' and so on should bring up a list of providers.

Visit their websites, compare and contrast their offerings. What solutions or packages do they offer and who do they cater for? They will all likely say that they can provide similar things, but look for points of difference - unique selling points that align closely with your goals.

Read testimonials and explore case studies to gain real world insights from the industry into their capabilities and successes.

Their website should give you a good sense of what they can provide, but there will be opportunities to find out more by requesting information via contact forms - they love receiving those!

Review sites such as Capterra are also a great way to get a sense of the systems in practice. Search using the term 'cemetery software', 'crematory software' or similar to find listed vendors - look for 5 star ratings but also look for lower ones where they're lower - read the comments for context - these come from real people who use the systems daily.

Industry Publications and Forums

Reading industry publications or participating in online forums related to deathcare management are a good way to find out who or what people are talking about. Many associations have printed or online publications such as magazines or newsletters - these sources often highlight vendors and solutions that are making significant impacts in the industry. They will also often carry vendor ads providing key messages and opportunities to learn more.

Association vendor directories

In a similar way, check out industry association vendor directories, focusing on cemetery management solutions - these resources can provide you with a comprehensive list of potential vendors to help your research.

Speak to industry colleagues

Many of our customers have told us that one of the ways they discovered our solution was by speaking with other deathcare service providers. A very effective strategy for researching vendors is to ask other cemeteries or crematories within your area. Reach out to colleagues who have undergone digital transformations - seek insights and recommendations and benefit from their experience.

Taking a strategic approach will help to ensure you're in a better place when it comes to shortlisting your options (more of which shortly). Remember, investing time and effort in market research is an investment in the future success of your cemetery's digital transformation.

5. Getting the most from demos.

Product demonstrations play an important part in your research and shortlisting processes - offering a firsthand experience of potential solutions, aiding informed decision-making, and giving you a good sense of your potential new partner.

To maximize their value to you, it's important to come to them prepared, ensuring that the right stakeholders and decision makers from within your organization are present to provide input and to make sure that all bases are covered in terms of specifications and functional requirements.

Before a demo, you may likely undertake a discovery call - this will give the vendor an opportunity to understand your unique needs and challenges before they present the solution to you and your team - following which, and depending on the specificities of your procurement process, they may provide a proposal.

So, how do you ensure you get what you need?

Understand the Objectives

Before scheduling a demo, ensure you have a clear idea of your objectives and requirements. Having a well-defined set of functional and non-functional requirements will help you focus on what truly matters to you during the demonstrations.

Have the right people in the room

Ensure that the right stakeholders are present. Include decision makers from various departments, such as operations, finance, and IT. This multi-functional approach will help to ensure a comprehensive assessment of the solution's fit across the organization as a whole.

Ask questions and seek clarifications

Encourage stakeholders to ask questions and seek clarifications during the demo. Address any doubts or concerns promptly, as this will help you make well-informed decisions based on a more complete understanding of the solution. Questions will naturally flow as you get a better understanding of the solution's capabilities, but having a few considered in advance will help keep you on track.

Ensure the demo is tailored to you

Ask vendors to tailor or personalize their demonstrations to your specific needs. Providing them with scenarios relevant to your operations will let you see how their solutions address your unique challenges.

Encourage them to walk you through actual tasks and functionalities, so you gain a real understanding of how the system operates in real world scenarios. This will help you assess how well the software aligns with your day-to-day operations.

Consider the user experience

A positive user experience is crucial for successful system adoption. Your admin team may not be on the call, but be aware of the end user experience. Is the interface intuitive and user-friendly? Can you navigate through different modules seamlessly?

Think about your future needs

Discuss the scalability of the solution. Will it accommodate your future requirements and plans for long-term growth? Evaluating the system's adaptability to your evolving needs - remember - a new solution is a long-term investment.

Gather feedback

After each demonstration, gather feedback from stakeholders - this information will be invaluable during the decision-making process. Compile all of this into a comprehensive document. This will serve as a reference throughout the procurement process and guide vendor discussions. If you utilize tender or quotation request documents, these may form an important part of your appraisal.

Treat demonstrations as learning experiences, ensuring that you gain a deep understanding of how each solution aligns with your unique needs and positions you for a successful digital transformation journey.

6. Shortlisting.

Shortlisitng is perhaps what we might typically think of as the procurement or tendering process 'proper', but it's certainly not the only part.

The specific methodology you employ, as you know, will in large part be determined by your ownership, governance structure, or regulations.

Some may have more flexibility in their procurement processes and can choose vendors based on self-determined factors, and for others the processes may be more formalized and regulated, adhering to public procurement laws, which require some form of demonstrable transparency and open competition - for example, the issuing public tenders, evaluating bids based on predetermined criteria, and so on.

Tender requests may be issued via a number of means including tender portals, procurement systems, or even advertisements in newspapers.

However you do it, and regardless of the type of cemetery or crematorium you operate, the ultimate goal is the same - to secure the best solutions and services via a shortlisting process of assessment and evaluation.

It's also important to note that the ultimate decision makers - such as a board or senior management, may be a few parts removed from some of the more practical aspects of the process, so it's important to obtain all of the information you need to present the option or options you feel will meet your needs in the best way possible.

With all of that in mind, let's look at some ways you can start getting closer to finding the right partner.

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6. Shortlisting cont.

Procurement techniques

Your procurement methodology may be immutable, but where there is some leeway, consider the techniques you're using and what ultimately they should be doing for you.
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Used by some companies in the early stages of procurement, a Request for Information (RFI), is a preliminary 'fact-finding' document of sorts, asking for general information about the vendor's capabilities, experience, and solutions (some even use it during the research phase). It will allow you to start shortlisting based on initial responses.

A Request for Proposal (RFP) is a more detailed document that may typically be sent to a shortlist of vendors after an initial screening process, outlining the scope of work, specs, project objectives, functional and non-functional requirements, timelines, budget, and evaluation criteria. It provides vendors with detailed information about what you're looking for in a solution and provides a basis of evaluation.

Whatever you use, broadly, a comprehensive tender document may include some or all of the following:

Introduction and Background

The purpose of the project, its objectives, and the context of the process. Offer a brief overview of your organization and the specific requirements you are seeking to address.

Scope of Work and Specification

The scope of work for the project, detailing the products, services, or solutions required, include specific functional and non-functional requirements that vendors must meet.

Evaluation Criteria and Scoring Mechanism

The evaluation criteria that will be used, along with your scoring mechanism.

Timeline and Deadlines

The timeline for the procurement process, including the deadline for vendor submissions.

Submission Requirements

Clear instructions on how vendors should submit their proposals to ensure consistency and easy comparison.

Confidentiality and Non-Disclosure

A section that outlines the confidentiality and non-disclosure requirements for the procurement process to protect sensitive information shared during the evaluation.

Pricing and Payment Terms

A section for the vendor to outline costs, payment schedules and terms.

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Questions and clarifications

Contact info for any questions or clarifications vendors may have regarding the procurement document, allow sufficient time for vendors to seek clarifications before the submission deadline.

Terms and Conditions

Any additional terms and conditions relevant to the procurement process, such as ownership of intellectual property, warranties, and liability clauses.

Vendor Selection Process

You may wish to outline the steps and criteria that will be used to shortlist potential vendors as well as any legal or contractual requirements that vendors must adhere to if selected for the project.

Together - along with your research and solution demonstrations, this information should provide a good basis on which to assess and evaluate potential vendors and put forward a case to your decision makers.

7. Understanding partnership roles.

Congratulations...you've decided on the best solution and found your ideal partner.

Now the real work starts.

Selecting the right vendor is just the beginning of your transformative journey.

A successful, long-term partnership - one that meets your needs in the best way possible - is predicated on both parties having a clear understanding of each other's roles, responsibilities and expectations from the outset.

So what should you expect from your vendor and what do you need to understand about your own role in the process?

Defining Roles and Responsibilities

Both parties should clearly define their roles and responsibilities in the partnership. This includes assigning key personnel from your and your vendor's organization in terms of who will be responsible for project management, support and decision-making. Assign 'champions' within your organization with key responsibilities and powers of decision making to provide leadership, and bring your team along with you on the journey.

Commitment to Support

Your vendor should demonstrate a commitment to ongoing support and assistance. Expect them to provide comprehensive training for your staff to ensure a smooth transition to the new system. They should also offer ongoing technical support and be responsive to any issues or inquiries that arise pre, during and post implementation.

Timely and Effective Communication

Open and transparent communication is essential for a successful partnership. Your vendor should keep you informed about project progress, updates, and any changes. Likewise, be prepared to provide timely feedback and respond to inquiries in good time to keep the project on track. Facilitate effective communication between your partner and internal stakeholders. Keep all relevant parties informed about the progress of the transformation and address any concerns promptly.

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7. Understanding partnership roles cont.

Active Engagement and Collaboration

Your active engagement in the implementation process is vital. Participate in meetings, and discussions with the vendor to provide critical input and ensure that the solution meets your expectations.

Understanding Your Vision and Goals

A strong partnership hinges on the vendor's alignment with your vision and long-term goals. Think back to the start when we were setting our goals and objectives - these should be clearly communicated to your vendor, who should work with you and contribute insights to help achieve them through their solutions.

Embracing Change and Training

Understand that adopting a new system will require changes to your existing processes. Change of any kind can be daunting. Be sensitive to that, while encouraging your teams to embrace changes in the understanding of the wide-ranging benefits and improvements they'll bring - both to their daily roles, and to the wider organization. Empower staff with the necessary training and resources to adopt the new system effectively and encourage their participation during the learning process.

Nurture a Collaborative Culture

Cultivate a collaborative culture between you and your partner. Regularly share feedback, ideas, and best practices to optimize the system's usage and continuously improve operations.

Celebrate Success Together

And finally...don't forget to celebrate milestones and achievements together. Recognize both partner's contributions to your success and acknowledge their dedication to making your partnership a rewarding one.

Building a strong vendor partnership requires active involvement, mutual understanding, clear communication and a shared commitment to achieving your vision. By setting clear expectations and understanding your role in the process, you lay the foundation for a successful, long-term relationship.

Further reading and resources

For the latest insights from PlotBox, visit our blog page:

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