Legacy.com is offering funeral homes more robust services after buying ObitData.com, the only national provider of funeral home market share information.

Stepher Bartol, 51, founder and CEO of Legacy.com in Evanston, Illinois, says most funeral professionals can’t waste valuable time counting obituaries to determine the market share of competitors.

Fortunately, ObitData.com can do it for them – and it can do so for as little as $79.95 per month – which made buying the company an intriguing prospect.

The fact that Legacy.com could deal directly with its former chief marketing officer, John Bikus, 49, the founder of ObitData.com, sold Bartol on the deal.

Bikus is “a really smart guy,” Bartol says. “He was part of the management team that originally helped build Legacy.com, and we think very highly of him. He’s agreed to help fully transition the ObitData.com operation to Legacy.com by the summer, and in the process is advising on investments we can make to further improve upon the service he built.”

Buying ObitData.com made sense because Legacy.com is solving a problem for funeral homes. “Rather than create a market share product from scratch, we decided to purchase what John has and will build on it,” Bartol says.

Time is calling attention to grief in a big way in its latest issue, which features Sheryl Sandberg, the chief operating officer of Facebook and the co-author with psychologist Adam Grant of “Option B: Facing Adversity, Building Resilience and Finding Joy.”

The cover includes the headline, “Let’s Talk about Grief,” and the article highlight’s Sandberg’s struggles after losing her husband, SurveyMonkey CEO and venture capitalist Dave Goldberg, who died of a heart attack while working out May 1, 2015.

Keeping a journal was one way Sandberg coped, and her entries became the basis of the book she co-wrote, which Publishers Weekly says affirms “there’s no one way to grieve and no one way to comfort.” The magazine adds, “For those who have suffered a tragedy, this book provides helpful advice in the form of case studies, expert commentary, coping mechanisms, and most of all, hope, expounding upon the capacity of the human spirit to persevere.”
Bartol was also looking out for Legacy.com’s 1,500 newspaper partners, as well. “We want to help newspapers see the share of obituaries that they are getting from funeral homes in the marketplace, because we want them to understand there is quite a bit of variability,” Bartol says. “In some markets, funeral homes are placing all their obituaries in the newspaper, but then you have others who are not, and they are sending them fewer and fewer obituaries.”

That results in an obvious question: Why is that?

It’s partially because newspapers need to become better partners with funeral homes so families see the value in placing an obituary. “There are lots of reasons to have transparency for everyone,” Bartol says.

Bikus, who started ObitaData.com in 2013, did not disclose financial terms of the sale, but he’s happy with the outcome. “I kind of hatched this idea when I was at Legacy.com, and we actually looked into it a little bit, but it didn’t feel like it was the right fit for the Legacy.com business model at that time,” he says.

Knowing that Legacy.com was seeking new ways to enhance its product line for funeral homes and newspaper customers – and also knowing that while ObitaData.com was profitable, it needed resources to grow – selling the company made sense, Bikus says.

“I’m happy that the product and company will continue to live – as an entrepreneur, you want to see that,” Bikus says. “When you start a company, you want to leave some form of legacy – to see that you started something, and it worked. That was an important thing for me.”

But to say that he feels “vindicated” to have sold ObitaData.com to his former employer would be the wrong word, Bikus says. “For Legacy.com, it just wasn’t the right time and the right product for the company – I don’t think it was ever an issue of belief,” he says. “It
was an issue of, ‘Is this the right thing and the right time and the right way to dedicate our resources?’ And over time, things change and evolve, and that is what happened here.”

Bikus is retaining ownership of a list-matching service that serves companies unconnected to funeral service that was part of ObitData.com, which Legacy.com was not interested in acquiring. That portion of the business will be rebranded, Bikus says.

“Outside companies like life insurance companies will give us names of individuals they have policies for; it is important to them to understand when a person has passed away,” Bikus says. “ObitData.com as a company will continue to function and serve list-matching customers, but I’m not sure if it will expand.” It is, however, a profitable business and one that makes sense to continue, he says – just not something that Legacy.com wanted to be involved with.

Bikus is already thinking about new startups, but he does not rule out working for a company that wants to employ a man of his talents.

Legacy.com’s acquisition of ObitData.com is its second recent purchase in the funeral space: In April 2015, it bought former rival Tributes.com, which continues to serve about 400 funeral home customers and attract about 6 million unique visitors per month.

Legacy.com has undergone multiple transitions in recent years: In 2012, Great Hill Partners, a Boston-based private equity firm, bought the company in a deal that valued it at $50 million to $100 million.

In March – about six months after Bartol returned to Legacy.com as CEO – Pamplona Capital Management, which includes a $1 billion U.S.-based private equity fund that focuses on growth equity and control investments in the technology, media and telecommunications sectors, bought a majority stake in the company.

“‘We don’t discuss details, but Pamplona is the majority owner, and the management team also made a meaningful investment and has a direct personal stake in the company’s success,’” Bartol says. Pamplona valued the company at “substantially more” than what Legacy.com was valued when it last changed hands in 2012, Bartol says.

As to how Pamplona’s acquisition of the company came about, Bartol explains, “One of the members of the investment team at Pamplona had previously been part of the team at Great Hill Partners in 2012 when they purchased us. So, he was very familiar with the company and had followed our success for several years. He knew the team and the business model he was investing in.”

Great Hill took pride in its stewardship and served its clients, employees and shareholders well, Bartol says – and it allowed the management team at Legacy.com run the company as it saw fit. “We believe Pamplona will do the same, with perhaps an even greater appetite to invest and grow the business,” he says.

In addition to its investment in Legacy.com, Pamplona also owns OGF, which is the No. 1 funeral service provider in France and the country’s only fully integrated funeral operator, supplying a full spectrum of funeral products and services. Pamplona has not set any expectation as to the amount of time it intends to own Legacy.com, Bartol says.

With hindsight, Bartol would buy Tributes.com again. “It expanded our offerings, brought us closer to several hundred funeral homes and injected additional funeral industry DNA into our organization, which led, for example, to our involvement in the Fund ’45 campaign with the Funeral Service Foundation this last year (at the
National Funeral Directors Association convention),” he says. “That is just one simple example of where we have proudly expanded our efforts supporting funeral homes since the acquisition of Tributes.”

While John Heald, a licensed funeral director and formerly the vice president of business development and sales at Tributes.com, has stayed on with Legacy.com as its vice president of funeral home business development, Elaine Haney, who was president and CEO of Tributes.com before becoming Legacy.com’s chief operating officer, left the company in March.

Bartol declined to say why Haney is no longer with the company, but as a regular attendee at trade shows and a high-profile and respected name in the death-care industry, her absence was noted at the recent International Cemetery, Cremation and Funeral Association in Nashville, Tennessee.

With its two latest acquisitions, Legacy.com has doubled down on its mission of serving funeral homes in addition to newspapers, which is something Bartol freely admits Legacy.com needs to get better at conveying. “We have our heads down focused on the business, and we don’t do a lot of press if you will,” he says.

That, however, is something that may need to change, he says. “We are very under the radar, and when you are under the radar, I think there are misconceptions and misperceptions existing in the marketplace because others try to tell your story,” he says. “Sometimes, there are a small number of vendors that maybe benefit from funeral homes not having the full picture, and others try to define who we are. One of the things I want to do in 2017 is to start doing a better job at communicating to the industry about what we are doing that is really valuable for funeral homes.”

A Reinvigorated CEO

Some in funeral service may be surprised to see Bartol back at the helm at Legacy.com, as he had turned over the job to Steve Parrott, the company’s former chief operating officer, in July 2015.

While Bartol kept the role of executive chairman, he stepped away from running the company – but that all changed when Parrott resigned “suddenly for personal reasons” in October 2016. “I was invited to return as CEO. After having stepped back from the business for about eight months, I was energized and excited to return to help write the next chapter of the company,” he says.

Stepping back gave Bartol the chance to spend some time with early-stage entrepreneurs in the Chicago area. “It’s a neat thing to do because it exposes you to cool new stuff that is coming,” he says.

But now, “I’m back – all in,” Bartol says. “My view is that there is another chapter to write in the business, and I’m not sure how long it will take – how many years – but I’m not really even thinking about an exit at this point … I’m where I should be.”

Having the chance to step back and return on your own is empowering “because you’ve made the choice to be there again,” Bartol says. “I have seen a lot of different startups and ventures doing some really cool things, but in the process, I have thought, ‘Would I want to jump in and help build that company?’ – and I always come back to comparing it to Legacy.com, and I say, ‘Would I be as excited as I was and am about Legacy.com?’ – and I never am.”

While Bartol has investments in some other companies, he’s investing in ideas and people, which is different than running them himself. “I have concluded I would not want to run another company unless it made me as excited as Legacy.com – and I haven’t seen any of those out there,” he says. “While that was not the purpose of me stepping back, it exposed me to a lot and reconfirmed for me how much I care about this company.”

The break also gave him the chance to take some long bicycle rides and the opportunity to reflect on the company he’s built – one that employs more than 200 people, attracts 44 million unique visitors per month and is a top-50 website in the United States.
Bartol started the company in 1998 after working as a management consultant with McKinsey and Co. for 10 years.

“I was really looking to do something more entrepreneurial, and the internet was starting to happen in a big way,” he says. “I originally thought about joining a company that was doing something already, but I quickly realized that a lot of those companies were unclear on what I could bring to the party as a management consultant.”

When Bartol learned about a gentleman who was frustrated because he never knew where to send charitable donations if he missed seeing an obituary in the printed edition of the newspaper, he was intrigued. That man wanted obituaries to be placed on the internet, but he didn’t want to start the company himself.

That man and some others, however, did become angel investors in what would become Legacy.com, which turned some heads “because it wasn’t the sexiest thing happening on the internet,” Bartol says. “But I just saw the social importance of it and the potential for it, and that’s how I went all in.”

The idea from the beginning was to work directly with funeral homes, but it didn’t take long for Bartol to realize he wasn’t going to get the results he wanted. “When we launched initially, I was not smart enough to know that newspapers were the ideal partner for us,” Bartol says. “We actually started by talking with funeral homes … the first year, I talked with hundreds of funeral homes.”

That meant knocking on doors and trying to engage funeral home owners about the idea of posting obituaries online. “I literally remember days getting in my car in the morning, and I didn’t come home until late that night – I was just knocking on the doors of funeral home directors and telling the story about online memorialization. That was my introduction to the funeral industry,” Bartol says.

The introductions, however, did not result in the payoffs he wanted. “We quickly learned we were too early – they basically told us they were not ready for us,” Bartol says. “They told us by politely letting us in but not embracing it.”

It was then he had his very profitable epiphany: There already was a mechanism for obituaries to find their way to the public, and that was through newspapers – and if he could partner with them, he’d make getting obituaries online a reality.

At that time, relatively few newspapers were posting obituaries online, and they were basic. “We launched our program with the Chicago Tribune as our first newspaper in 2001, and it was a big success,” Bartol says. “The Los Angeles Times followed, as well as several other newspapers, and it didn’t take too long to become an industry standard.”

Bartol is happy to see, however, that the funeral profession has finally come around to seeing the value and importance of online obituaries – and he remains convinced that newspapers and funeral homes boost their success when they work together.

“We believe more than ever that the relationship between newspapers and funeral homes is not a zero-sum game – one’s gain is not another’s loss,” he says. “In fact, their fates are quite linked. How so? For funeral homes, there is no better way to reach the public than through an obituary placed in the local newspaper – print and online. Research suggests that nearly nine in 10 people are interested in placing a newspaper obituary for someone they love. When a funeral home helps a family place that newspaper obituary, it helps fulfill this wish and generates brand awareness for the funeral home unlike anything it can achieve elsewhere. It is just smart business.”

But newspapers must do their part by offering compelling obituary solutions at reasonable prices, Bartol says. “The obituary section is one of the most read sections of the local newspaper,”
Bartol says. “Newspapers want healthy, vibrant funeral homes serving families and regularly placing obits in the paper. It is also smart business for the newspapers.”

While Legacy.com supports newspapers setting their own obituary prices, it has tried to convey that they must be reasonable, Bartol says. “For many years, when we were building this business, we would see annual increases,” Bartol says. “It was just kind of the regular course of business that you’d have an increase in rates, including obituaries, for many years. But in the last few years, that has finally changed.”

Newspapers should know that some families – and the funeral homes representing them – are pushing back on pricing, Bartol says. “We are signaling that there is a point at which it’s too much – the market is kind of telling you that there is a limit,” Bartol says. “We’ve also said to newspapers that we need to keep innovating so that families and funeral homes are getting the value that they pay for – and that is where we come in on the online side.”

Bartol is proud of the robust solutions that Legacy.com offers its funeral home partners, including its Funeral Home Local Spotlight offering, which features a funeral home’s obituaries on a newspaper’s obituary homepage, which is the most relevant and heavily trafficked location for obituaries. “This program is a win for all participants,” he says. “For families, more people view the obituary and see their loved one featured – and it feels great for funeral directors to be able to tell families that their loved one is featured so prominently on the newspaper obituary site. For the funeral home, the obituary is amplified to reach more of the families most likely to use this funeral home in the future, including additional branding and links to the funeral home website and preplanning section. Bonus program benefits vary some from market to market by newspaper, but in many cases there is also an ability to designate a favorite floral vendor and to participate in floral sales through these popular pages.”

Legacy.com has case studies showing that in newspaper markets powered by Legacy.com, the online reach achieved for an obituary placed in a newspaper can be 100 to 400 percent greater than in newspaper markets without Legacy.com. “In other words, Legacy.com helps create a newspaper obituary section with substantially more benefit for newspapers, funeral homes, and

Facebook: Friend or Foe?

Many businesses look at Facebook and see a threat, but Stopher Bartol, the founder and CEO of Legacy.com, sees opportunity.

Those who think that Facebook gets in the way of what Legacy.com is trying to accomplish are not seeing the big picture, Bartol says. “Facebook is a place where people gather, and it is an important place for people to share news of the moment, he says. “If you think about it, death is one of the most viral events out there.”

Legacy.com’s job is to figure out how to participate in that virality, Bartol says. “Let’s make sure if there is a funeral home or newspaper guestbook we are hosting that it finds its way into the conversation that is happening on Facebook,” he says. “If we can do that, we can reach people we may not have reached because all the people on Facebook may not have found their way to the funeral home or newspaper website. Through Facebook, we have actually expanded our reach … we are constantly looking for ways to amplify our reach, and I view Facebook as a big opportunity.”

Even though Legacy.com gets more than 10 million monthly visits that originate from Facebook, it’s still an opportunity that is largely untapped, Bartol says.
families than newspapers not partnered with Legacy.com,” Bartol says.

Over the years, Legacy.com has made it a priority to feature funeral homes more prominently on its site and on newspaper sites, Bartol says. “We’ve really worked hard on that, and that is why it is challenging when we hear someone saying we are stealing their traffic or we are not working in the interest of funeral homes when we feel that is the opposite of what is happening, Bartol says.

At one time, that type of criticism was commonly heard from Tributes.com, which is now part of Legacy.com – and it may have had some validity at one time, Bartol admits.

“Certainly the criticism was more fair back then,” he says. “I don’t think funeral homes cared as much about online obituaries back then, and maybe there was a time or moment when they cared but we didn’t realize that they cared.” He adds, “But once we knew they were in the game and that online obituaries were important to them, we responded, and we’ve been responding ever since.”

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**Foundation Partners Group Buys Steele’s Family Funeral Services**

Foundation Partners Group, a leading provider of innovative funeral, cemetery and cremation experiences and products based in Orlando, Florida, has bought Steele’s Family Funeral Services in Winter Haven, Florida, according to a news release. The acquisition adds to FPG’s growing network of locations in Central Florida.

“We see in Bill and Susan Steele many of the same attributes we value as a company, including their strong commitment to both anticipate and address the changing needs and expectations of families who have suffered a loss,” says Bob Bukala, FPG president and CEO. “This is a strong acquisition for Foundation Partners Group as it allows us to build on our presence in Central Florida.”

“Susan and I are very excited to join forces with Bob and his team at Foundation Partners Group,” says Bill Steele, owner of Steele’s Family Funeral Services. “We believe FPG is the right cultural fit for our funeral home, and we look forward to working with the team at FPG to continue to help our families experience excellent and compassionate care as they honor and celebrate the life of a loved one.”

Steele’s Family Funeral Services was founded in 1996 and has grown to become a leading funeral home in the Winter Haven area. As third-generation professionals living in and serving the Winter Haven community, the Steele family has built many local ties and has developed a solid reputation for integrity in the market.

“Bill and Susan Steele enjoy an outstanding reputation in the Winter Haven area and are a wonderful addition to the FPG family,” says Justin Baxley, senior vice president of business development at FPG. “FPG and Steele’s Family Funeral Services are a natural fit as we share the same desire to provide the highest value possible to those we are privileged to serve.”

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**Free Guidance from Doug Gober**

Stephen R. Lang, chairman, president and CEO of Homesteaders Life Co. in West Des Moines Iowa, issued an update on the company’s performance in an annual report.

“As I reflect on 2016, I am tremendously proud of everything we accomplished together,” he says. “Last year, our end-of-year sales exceeded the previous year by more than $27 million. Our new business team reviewed more applications than ever before and, at the end of 2016, 87,000 additional policyholders had peace of mind knowing their funeral had already been planned and funded. Throughout the year, we paid 55,000 claims, continuing our tradition of being there when families need us the most.”

Lang adds, “We reached these milestones while maintaining our commitment to growth and security, reinforced by A.M. Best’s 2016 affirmation of our A- (Excellent) rating and a customer satisfaction rating of 99 percent (according to Homesteaders’ 2016 Customer Satisfaction Survey). To top it off, Homesteaders was also named a top Iowa Workplace in recognition of our outstanding company culture.”

He concludes, “We are honored to be the preferred funding provider for thousands of funeral professionals across the country, customers who know they can depend on us as a committed partner for safe, reliable preneed funding. Our success is a direct result of mutually beneficial relationships with our stakeholders, and I want to take this opportunity to thank you for your continued commitment to our company.”


Take Funeral Service Insider’s Latest Surveys

You’re invited to participate in our latest surveys:

• Visit www.surveymonkey.com/r/casketsurvey to take our Casket Survey.
• Visit www.surveymonkey.com/r/FuneralHR to take our Recruiting and Staffing Survey.

We’ll publish the results along with our analysis in future issues.
Death-care professionals from throughout the United States are gearing up for the Cremation Innovations Summit, May 5, in Baltimore.

We recently caught up with one of the summit’s instructors, Steve Jones, director of strategic business solutions at Matthews Aurora Funeral Solutions, who will be delivering a presentation titled “Presenting to Win and Serve: Best Practices in Positioning Cremation Products and Services.” He responded to a couple questions.

**How does a funeral director get his/her staff to buy into new presentation approaches?**

The key is the presentation/approach itself. A funeral director can say to a family something like this: “For our families that choose cremation, we have a program that we call (fill in the name), and the families we serve tell us that our program really simplifies the arrangement process for them.” If the funeral director starts the arrangement with a positive aspect of the new approach that relates to the needs of the cremation family (in this case the desire to keep things simple, and who doesn’t love things made simple?), the family is likely to be open to the new concept because the funeral director has related to an important need.

Getting the staff to buy into new ideas or concepts is largely the responsibility of the company that is providing the solution to the funeral home. For example, when I sell a cremation program to a funeral home, I expect to do a follow-up visit with the staff to educate them as to the value of the program. This includes explaining to the staff why the program makes things simpler and better for both the family served and the staff itself. When everybody’s on the same page and understands the program fully, that usually goes a long way in getting the staff to accept the program.

**How has technology helped funeral professionals present more options to cremation families?**

Technology has helped in many ways — the internet, tablet apps, interactive software, etc. Technology has allowed families to do much of the arrangement process from their homes. Products and services can be shown to families on large screens, which many times eliminates the need for the family to be in a selection room. A typical selection of 20 caskets can be shown electronically with hundreds of products. In short, technology has opened up nearly unlimited options for the family and the funeral director.

Technology also allows families to make important decisions from multiple locations, which simplifies the process and allows more family members to be included. In short, families are going to use technology to gather information and educate themselves, so funeral directors need to be the gateway to the technology solutions for the family.

Visit www.katesboylston.com/summit to view the other speakers and to sign up for the summit.
Thacker Caskets recently paid it forward to the next generation of funeral directors by donating a casket to the mortuary science program at Ogeechee Technical College in Statesboro, Georgia, according to a news release. The casket will be used to teach and educate Ogeechee’s mortuary science students on casket components as well as the value features of burial caskets.

Ogeechee Technical College, accredited by the American Board of Funeral Service Education, affords students the opportunity to earn their associate degree of applied science in Funeral Service Education. Ogeechee aims to prepare students for the successful completion of all necessary board examinations and prepare the student for the rigors of daily work within the funeral industry. Currently, Ogeechee has 103 students enrolled in various stages of the curriculum.

Faculty member Jack Norvell reached out to Thacker requesting a demo casket for the mortuary science program. Norvell, a licensed funeral director and embalmer for over 45 years, expressed his excitement in being able to have a casket for the students to practice with. Norvell grew up in his own family’s funeral business and began teaching in the mid 2000s.

Added Lori Anderson-Gordon, Thacker’s South Georgia sales consultant, “I was thrilled to be able to give back to Ogeechee’s mortuary science program. Several of my customers have not only graduated from Ogeechee but also teach and speak to students of the program on a regular basis. It is wonderful to be able to do what I can to partner with my customers and give back to the future generation of funeral directors.”

Sincerely,

Thomas A. Parmalee, Editor
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The students and staff of Ogeechee Technical College with Thacker Casket’s South Georgia sales consultant Lori Anderson-Gordon (in the black shirt with her hand on the casket).
Today, more people are getting cremated and “traditional” doesn’t mean anything when it comes to funeral service.

With that comes challenges – but also opportunities. At the Cremation Innovations Summit, you’ll discover how to recognize and respond to both. Learn how to:

- Anticipate the needs and wants of families that choose cremation.
- Create memorable experiences with or without a body present.
- Communicate the value of cremation-oriented products and services.
- Improve search engine optimization to outrank competitors.
- Embrace cremation as a profit generator.

The conference will include keynote speakers as well as mini-presentations from some of the most innovative companies that are offering new products and services to help cremation families honor loved ones.

**BONUS:** The Academy of Professional Funeral Service Practice has approved the conference for 5.25 hours of continuing education.