

# FALL MANAGEMENT CONFERENCE

renaissance washington hotel • washington, dc • october 7-10, 2009



**INSIDE!**

Financial Tactics  
Survey: Even if you  
cannot commit yet  
to attending the  
conference, please  
complete and return  
the survey  
**NOW!**

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the largest CEO conference in the cemetery, cremation and funeral service industry

## Letter from the Program Chairs

### Presenting ICCFA's Fall Management Conference... With a Few Twists

Greetings! As co-chairs of the 2009 Fall Management Conference, we look forward to bringing you the superb CEO-level education and networking you've come to expect from this event... as well as a few new elements we think you'll enjoy.

This conference is known for bringing in top business leaders from both outside and inside our profession to help us approach our management decisions in new ways. In addition, attendees know they'll have opportunities to share ideas with the top minds in the industry at our evening receptions. This year will be no exception. But, we've also added a few twists.

**Panel Discussions and Member Survey: Focus on Financial Tactics**—As business executives, we face tough economic challenges, and how we respond to those challenges could make or break our future. In a two-part panel discussion on "Succeeding in Tough Economic Times," you'll learn what adjustments colleagues are making regarding staffing, marketing, budgets, capital projects and more.

As part of these sessions, we are conducting a Financial Tactics Survey (see page 10). We're asking all industry members to complete this survey, which will give us a broad view of trends within the industry to complement the in-depth input of the panelists.

**Behind-the-Scenes Tour: Arlington National Cemetery**—You won't want to miss our exclusive behind-the-scenes tour of Arlington National Cemetery. To start off the tour, the ICCFA has been invited to participate in a wreath-laying ceremony at the Tomb of the Unknown Soldier. Next, we'll take a tram through the cemetery's grounds to see its rows of war memorials and monuments, as well as its most recent land development projects. This is a once-in-lifetime opportunity to see the cemetery from a perspective not available to the general public.

**Washington, DC: A Destination for the Whole Family**—One of the biggest twists this year is the conference location. Rather than a golf resort, this year we'll meet at the luxury Renaissance Washington, DC Hotel in the heart of our nation's capital. The Renaissance is within walking distance of the always-bustling Gallery Place, Chinatown and Penn Quarter neighborhoods and is just a short walk from the Smithsonian museums and The National Mall. Washington in early October is beautiful, with mild temperatures and low humidity, so bring along the whole family for a fun and educational trip.

Please take a few minutes to look over the full conference program, and then fax in your registration today. This year's Fall Management Conference offers educational, networking and tourism opportunities you won't find anywhere else.

John Bolton, CCE  
Matthews International  
Johnson City, Tennessee

Kevin Daniels, CCE  
The Daniels Company LLC  
Albuquerque, New Mexico

## Wednesday, October 7

6:30 to 7:30 p.m.

### Welcome Reception

The ICCFA Fall Management Conference is the place to be for cemetery, cremation and funeral service owners, execs and up-and-coming managers. Make the most of your time with your fellow industry leaders at our evening networking receptions.

## Thursday, October 8

8:30 a.m.

### Coffee/Continental Breakfast

9 to 10:30 a.m.

### Transform Your Corporate Culture

#### Alan Deutschman

Every company has a culture—the unspoken assumptions, mindsets and patterns that shape the way management and staff act and interact. Even among the most successful companies, aspects of this culture can prevent employees, departments and the organization as a whole from reaching their full potential.



Join Alan Deutschman to learn how you can create a real, lasting transformation within your company. Author of several books on management and leadership, Alan has gained his expertise from years of researching the high-tech, advertising, automotive and health care industries, as well as individual corporations such as IBM, Apple, Sony and Southwest Airlines. Alan will share which tactics do and do not work in transforming corporate culture.

This session is not about adopting a quick fix or about following fads or feel-good trends. It's about creating deep-seated, fundamental shifts that will increase your company's productivity and profitability.

Alan Deutschman is author of "Change or Die: The Three Keys to Change at Work and in Life" and "The Second Coming of Steve Jobs," as well as "Walk the Walk: The #1 Rule for Real Leaders," to be published in September. He is a leading business writer and columnist,

having served as a senior writer for *Fast Company*, the Silicon Valley correspondent for *Fortune*, the “Profit Motive” columnist for *GQ* and a contributing editor at *Vanity Fair* and *New York Magazine*.

## 10:30 a.m. to Noon

### Keeping the Unions at Bay (with a Q&A/discussion session)

#### Anthony Casablanca

Under the pressure of declining membership, labor unions are lobbying for passage of the misnamed “Employee Free Choice Act.” Their goal is to make it easier than ever to form unions and to compel employees to join them, in the process restricting the rights of business owners and managers.

In this session, Batesville Vice President of Human Resources Anthony Casablanca will share his expertise on how to become “union resistant” through effective employee management and development practices.

Batesville Casket Company employs 3,400 employees in the United States, Canada and Mexico. Casablanca is responsible for the company’s overall labor, employment and talent acquisition as well as its employee development strategy. In May 2009, he was named Human Resources Professional of the Year by the Indiana Chamber of Commerce for “implementation of best practices, organization design and effectiveness, and alignment and accomplishment of the strategic direction of his company.”



## Noon to 1:15 p.m.

### Lunch on your own

## 1:15 to 2:45 p.m.

### Government & Legal Session: The View from Our Nation’s Capitol

Now more than ever, business owners are concerned with the economic and political decisions being made by our nation’s government. Join moderator Irwin Shipper and his panel of legal and regulatory specialists for this session in the heart of the federal bureaucracy. Panelists will report on their meetings with members of Congress, provide the latest updates on changing regulations and recommend strategies to make compliance work for you.

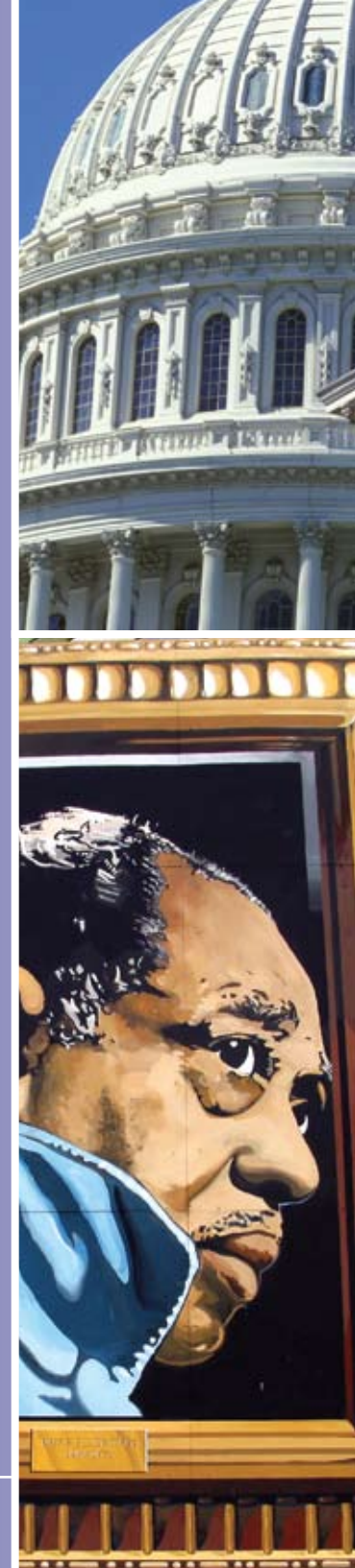
Sen. Bill Nelson (D-FL) has been invited as a guest speaker.

## 6:30 to 7:30 p.m.

### Evening Reception

#### tuesday, october 6 :: Pre-Conference Visit to The Hill

ICCFA members will make their annual visit to Capitol Hill on Tuesday, October 6, to meet with members of Congress and their staffs. If you can help arrange an appointment with a senator or representative and would like to join your colleagues, please contact Bob Fells at 1.800.645.7700 or rfells@iccfa.com.





## Friday, October 9

8:30 a.m.

**Grab & Go Coffee/Continental Breakfast**

9 a.m. to 2:30 p.m.

**Behind-the-scenes tour of Arlington National Cemetery**

Fall Management Conference attendees will take a tram tour led by Superintendent John Metzler and his executive team. The tour will begin at the Tomb of the Unknown Soldier, where ICCFA will participate in a wreath-laying ceremony. Additional highlights will include the cemetery's recent land development projects, which include a new half-mile stone wall holding nearly 6,600 cremation niches as well as new gravesites and columbarium courts.

Following the tour, attendees will enjoy lunch at the Women In Military Service For America Memorial. The tour and luncheon are being made possible by Matthews International. **NOTE: The tour fee is included in your registration, but you must sign up to go on the tour. See the registration form on page 11.**

## Saturday, October 10

8:30 a.m.

**Coffee/Continental Breakfast**

9 to 10:30 a.m.

**Own Your Market: Lessons from a Leader**

**Jon Shults**

How can a company establish itself as a market leader by offering a wide menu of products and services?



The Buchanan Group of Indianapolis, Indiana, is not your everyday cemetery and funeral service operation. In addition to its 14 funeral homes and eight traditional cemeteries and memorial parks, the company operates the Archdiocese of Indianapolis Catholic Cemeteries Association, the Forever Friends Pet Cemetery, the Cremation Center of Indiana, two community centers, Buchanan Financial Services and Family Legacies online memorials. Staff run management training programs at the firm's Community Life Center for companies ranging from cemeteries and funeral homes to industry suppliers, insurance companies and even a local health store.

Says Vice President of Sales Jon Shults: "Buchanan Group is really no different than any other organization. It's just that when we see a need for change, we take action, realizing that being content and maintaining 'status quo' is the last thing we should do if we want to survive in today's business world. We look at how funeral service is today and we challenge ourselves and our staff to see how it can be made better."

In this session, Shults will provide insights into The Buchanan Group's overarching business management philosophy as



well as specific projects and initiatives they have undertaken to move the company forward, including various technology solutions, the creation of work teams, financial decisions and the company's community outreach.

Jon Shults has more than 20 years of experience in cemetery operations, sales management, marketing and advertising. He has worked for The Buchanan Group since 2000. He was a stuntman in movies and television for many years and appeared in "Born on the Fourth of July," "Robocop," "Dallas," "Walker Texas Ranger" and many others.

**10:30 a.m. to Noon**  
**Succeeding in Tough Economic Times: A Two-Part Panel Discussion (with a Q&A/discussion session)**

How is the economic downturn affecting your business? What are you doing to adjust now and to prepare for the future?

In this two-part panel discussion, we'll hear from a cross-section of funeral service, cemetery and cremation executives on what they're doing, why they're doing it and how it's working. We'll cover a full range of operations and marketing issues related to today's challenging business environment, including topics such as:

- advertising
- marketing messages
- what customers are choosing
- staffing decisions
- budgeting
- investing decisions
- strategic planning
- lead development
- preneed/at-need sales
- competing on price, value
- benefits and compensation
- negotiations with suppliers
- capital projects


In addition, we'll review the results of the ICCFA Financial Tactics Survey (see page 10 and be sure to return the survey!) to identify trends and best practices within our profession.

Each panel discussion will include extensive opportunities to join the discussion, so come prepared to share your specific challenges and solutions and to take notes.

**Noon to 1:15 p.m.**  
**Lunch on your own**

**1:15 to 2:45 p.m.**  
**Succeeding in Tough Economic Times: A Two-Part Panel Discussion (with a Q&A/discussion session) continued**

**6:30 to 7:30 p.m.**  
**Evening Reception**



**Be sure to complete the Financial Tactics Survey on page 10. Results will be announced at the conference.**



# *A* BEHIND-THE-SCENES *Tour*



Arlington National Cemetery is the best known of the more than 100 national cemeteries in the United States. Its 624 acres shelter the remains of more than 320,000 servicemen and women, veterans from every war and major conflict in United States history. This is our nation's most sacred military shrine and bears silent witness to the whole of American history. More than four million people visit the cemetery annually, many coming to pay final respects at graveside services, of which nearly 100 are conducted each week.

# *of Arlington* NATIONAL *Cemetery*



The cemetery is the final resting place of many presidents, Supreme Court justices, military generals and national heroes. Its seemingly endless rows of memorials to the nation's war dead are punctuated by well-known monuments such as John F. Kennedy's Eternal Flame memorial and the Civil War Unknowns monument.

The cemetery recently completed a half-mile new stone wall that includes 6,573 niches on the inside. The Millennium Project, which will develop new gravesites and columbarium courts on the western edge of the cemetery, completed its first phase of construction in January 2009. Phase II will be underway at the time of our tour.

# A GOLDEN Opportunity

**Welcome to Washington, DC!** At this year's ICCFA Fall Management Conference, you'll find yourself in the heart of the nation's capital, a city unrivaled in historic and cultural attractions. Bring the entire family and plan to stay on for a few extra days to take in this one-of-a-kind tourist location.

The Renaissance Washington, DC Hotel is just a nine-block walk (or a short Metro ride, if you prefer) from The National Mall. This open-air park stretches almost two miles, from the **U.S. Capitol Building** at one end to the **Lincoln Memorial** at the other. Lining The Mall are many of the (free!) museums of the Smithsonian Institution. Just to name a few:

**Museum of Natural History**—Nowhere else will you find such a variety of natural wonders, from the enormous exhibits crowding the three-story-tall Dinosaur Hall to the tiniest of the museum's 35 million insect specimens, and from the often ethereal underwater creatures of Sant Ocean Hall to the very solid (though equally breathtaking) 45-carat Hope Diamond.

**Air and Space Museum**—Take a journey through time and space with exhibits from the Wright Brothers, to World War II aviation, to today's most advanced space exploration. You won't want to miss this museum's multi-media and interactive features, including its flight simulators (choose from SpaceWalk, Cosmic Coaster, F-18 Experience or Wings) and its IMAX theater's 3D experiences.

**National Portrait Gallery**—Presidents and poets, visionaries and villains, actors and activists—the gallery is a who's who in American history, depicted by the greatest artists of all time.

Also on and around The Mall are some of our nation's most renowned outdoor exhibits and monuments, including the **Washington Monument**, the **Reflecting Pool**, the **Jefferson Memorial**, the **Korean War Memorial**, memorials for World War I and World War II, the **FDR Memorial** and others.



# *to Discover* WASHINGTON, DC



Surrounding The Mall are the **National Gallery of Art** as well as dozens of historic federal institutions, including the **White House**, the **U.S. Supreme Court** and the **Library of Congress**. Go undercover and discover the new **International Spy Museum** and **The Museum of Crime & Punishment**, or come face-to-face with historical figures and celebrities at the newest **Madame Tussaud's** wax museum. A few Metro stops away, plan to visit the **National Zoo**, home to giant pandas Tian Tian and Tai Shan along with hundreds of mammals, reptiles and birds from throughout the world.

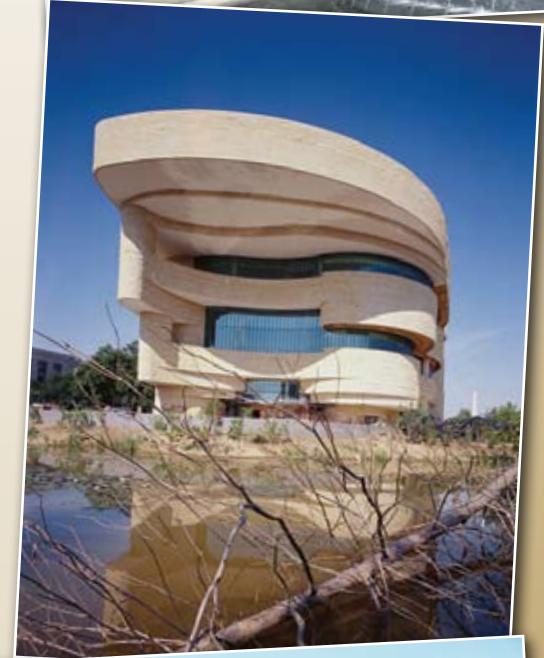
If you enjoy the theater, you'll find Washington is the next best thing to Broadway. Catch a show at the **Kennedy Center**, with its sweeping views of the Potomac, or at the **Folger Shakespeare**, **Woolly Mammoth**, **Ford's** and **Warner Theaters**. Opening October 1 at the **National Theater** (just a half-mile from the Renaissance) is **Jersey Boys**, winner of the 2006 Tony Award for Best Musical.

The Renaissance Hotel is ideally situated for enjoying the city, adjacent to both the festive **Chinatown** and trendy **Penn Quarter** neighborhoods. And if you want to shop until you drop, you'll find plenty of upscale and mid-range choices at the nearby **Gallery Place** and in historic, tony **Georgetown**, just a short cab ride away.

If you're a "foodie," come find out why DC is one of the most exciting restaurant towns in the country. Some of the world's leading chefs have set up shop here—**Eric Ripert**, **Wolfgang Puck** and **Laurent Tourondel** have joined local culinary talents **Jose Andres** and **Michel Richard** to make this city one of the best restaurant towns in the nation.

When the sun goes down, DC offers fantastic options for nightlife and entertainment, with historic **Blues Alley** in **Georgetown**, or the trendier **Helix Lounge**, **Lima** and **k street lounge** for cocktails, and dancing.

Early October is one of the most seasonable times to tour Washington. With the average highs in the low 70s and average evening lows in the mid 40s. Don't miss this once-in-a-lifetime opportunity to mix business with pleasure in the town that is best known for it!



# ICCFA FALL MANAGEMENT CONFERENCE Financial Tactics Survey

What type of company(ies) do you operate?

(check all that apply)

- Cemetery
- Funeral Home
- Crematory
- Monuments
- Supplier

Other: \_\_\_\_\_

On average, how many burial services do you perform per year?

- 0-50
- 51-100
- 101-200
- 201-300
- 301-400
- 401+
- Does not apply

On average, how many funeral services do you perform per year?

- 0-50
- 51-100
- 101-200
- 201-300
- 301-400
- 401+
- Does not apply

What percentage of your customers choose cremation?

- More than 50%
- 41-50%
- 31-40%
- 21-30%
- 11-20%
- 0-10%
- Does not apply

Which of the following staffing measures has your company taken in the first half of 2009 as a result of the recession?

(check all that apply)

- Layoffs
- Decreased employee benefits
- Leaving positions vacant due to attrition
- Salary freezes
- No changes

Other: \_\_\_\_\_

With the employee applicant pool expanding, have you taken any new measures to increase screening of new hires? (check all that apply)

- Requiring higher educational background
- Requiring higher levels of experience
- Introducing additional skills assessments
- Introducing additional background assessments
- No changes

Other: \_\_\_\_\_

What changes have you seen in net profits in the first half of 2009 vs. the first half of 2008?

- Decrease of more than 10%
- Decrease of 6-10%
- Decrease of 0-5%
- No change
- Increase of 0-5%
- Increase of 6-10%
- Increase of more than 10%

Has your ratio of preneed to at-need business seen any change in the first half of 2009 vs. the first half of 2008?

- Ratio of preneed has increased
- Ratio of preneed has decreased
- No changes

What changes have you made to your pricing in the first half of 2009 compared with the first half of 2008?

- Reductions of more than 10%
- Reductions of 6-10%
- Reductions of 0-5%
- No change
- Increases of 0-5%
- Increases of 6-10%
- Increases of more than 10%

What changes have you seen in negotiating with industry vendors? (check all that apply)

- Increased willingness to negotiate on price
- Increased willingness to negotiate on terms other than price
- Decreased willingness to negotiate on price
- Decreased willingness to negotiate on terms other than price
- No change
- Other: \_\_\_\_\_

How have your capital expenditures changed in 2009 vs. 2008?

- We have increased our capital expenditures
- We have decreased our capital expenditures
- No change

What changes have you made to your marketing in the 2009 compared with 2008?

- Reduced budget more than 20%
- Reduced budget 11-20%
- Reduced budget 0-10%
- No change
- Increased budget 0-10%
- Increased budget 11-20%
- Increased budget more than 20%

Have you changed your marketing messages to focus on pricing/discounts as a result of the economy?

- Yes
- No

Are you seeing an increase in phone shoppers?

- Yes
- No

Please share any additional trends you are seeing or measures you are taking as a result of the economy:

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Please share any questions/topics you would like the Fall Management Conference panels to address:

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**IT TAKES LESS THAN A MINUTE!**

Even if you cannot yet commit to attending the conference, please complete the survey and fax it to 703.391.8416.

# ICCFA FALL MANAGEMENT CONFERENCE

## Registration Form

Registration: If you are registering more than one person (besides spouse), please photocopy this form for each additional registrant.

Name \_\_\_\_\_ Nickname (for badge) \_\_\_\_\_  
 Spouse/Guest Name \_\_\_\_\_ Nickname (for badge) \_\_\_\_\_  
 Company \_\_\_\_\_  
 Address \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_  
 Telephone \_\_\_\_\_ Fax \_\_\_\_\_  
 E-mail \_\_\_\_\_

Please indicate if you are a:  CCFE  CCE  CFuE  CCrE  CSE  CFSP  CCCE  CM  CPC

Is your organization part of a multi-ownership company?  no  yes (identify) \_\_\_\_\_  
 If you have a disability that requires special accommodations, please check here and attach a statement of your needs.

**Fees:** Payment must accompany the registration form to receive the early registration discount. **Member/Non-member fees** include attendance at all educational sessions, admission to the evening receptions and a ticket for the Arlington National Cemetery tour. The Spouse/Guest fee includes admission to the evening receptions and the tour. **NOTE THAT ALL REGISTERED ATTENDEES MUST SIGN UP BELOW TO GO ON THE TOUR.**

REGISTRATION	Through 9/10/09	After 9/10/09	Total
<input type="checkbox"/> ICCFA Member Arlington Cemetery Tour _____ complimentary ticket	\$749	\$799	_____
<input type="checkbox"/> Non-member Arlington Cemetery Tour _____ complimentary ticket	\$899	\$899	_____
<input type="checkbox"/> Spouse/Guest <i>(includes admission to evening receptions and Arlington Cemetery tour)</i> Arlington Cemetery Tour _____ complimentary ticket	\$195	\$195	_____

**ARLINGTON CEMETERY TOUR TICKETS ONLY**  
 NOTE: A ticket for the Arlington Cemetery tour is included in each of the above registrations. Additional tickets may be purchased below for non-registered guests.

Arlington Cemetery Tour \_\_\_\_\_ # of Tickets \_\_\_\_\_ Price \_\_\_\_\_ Total \_\_\_\_\_  
 X \$79

**TOTAL PAYMENT:** (including registration fees and additional tickets) \_\_\_\_\_

**PAYMENT**  Check (Please make payable to ICCFA)  
 Credit card (circle one) MasterCard Visa Discover American Express

Card Number \_\_\_\_\_ Exp. date \_\_\_\_\_

Name on card \_\_\_\_\_

Signature \_\_\_\_\_

Security ID number (3-digit # on back of card or 4-digit # on front of AmEx) \_\_\_\_\_

Card's billing address/ZIP \_\_\_\_\_  
*(required)*

ICCFA USE DATE: \_\_\_\_\_ CO ID#: \_\_\_\_\_ TOTAL: \_\_\_\_\_  
 IND ID#: \_\_\_\_\_ PAYMENT: \_\_\_\_\_

**Cancellation Policy** Cancellation requests must be submitted in writing. For registration cancellations received prior to 9/10/09, a full refund minus a \$50 processing fee will be issued; for ticket cancellations received prior to 9/10/09, a full refund minus a \$5 per ticket fee will be issued. No refunds will be issued for cancellations received after 9/10/09.

**Registration List** Individuals whose registrations are received prior to 9/10/09 will have their names included in the Registration List.

**CE Credits** Funeral director continuing education credits for the Fall Management Conference will be available for certain states. Please contact the ICCFA to determine whether your state has awarded credits.

**CCFE, CCE, CFuE, CCrE and CSE Certification** Members interested in earning certification designations from the ICCFA can earn up to 15 certification points at the Fall Management Conference.

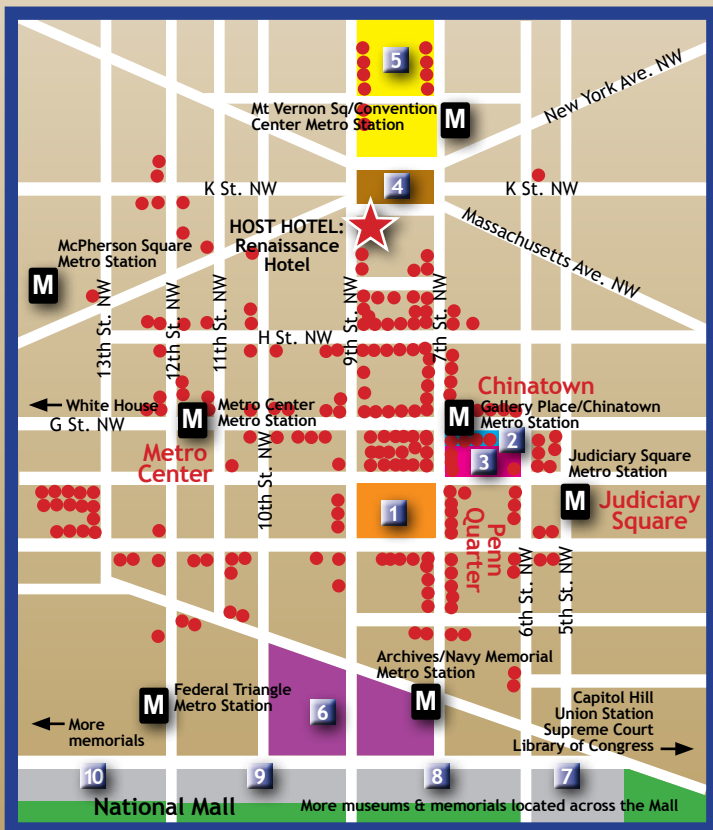
**Please return form and payment to:**  
 ICCFA Meetings Department  
 107 Carpenter Drive, Suite 100  
 Sterling, VA 20164  
 Phone: 1.800.645.7700 | 703.391.8400  
 Fax 703.391.8416 | www.iccfa.com

# HOST HOTEL

# Renaissance Washington, DC Hotel

In real estate it's all about location, location, location. Well, the Renaissance Washington, DC Hotel sits on prime real estate located in the heart of downtown DC. The hotel is uniquely positioned at the crossroads of the vibrant Chinatown/Gallery Place, Mount Vernon Square/Convention Center and Penn Quarter neighborhoods, and just a short walk to the National Mall, the Smithsonian Institution, Verizon Center, Capitol Hill, monuments and attractions. Bring your family, extend your stay and take in all that the nation's capital has to offer.

The ICCFA has negotiated the low room rate of just **\$279** per night. For reservations, call **1.800.468.3571** and request to be included in the ICCFA Room Block.



## MAP LEGEND

- |   |   |
|---|---|
| 1 Smithsonian American Art & Portrait Museum          | 7 National Gallery of Art—East Wing           |
| 2 Gallery Place                                       | 8 National Gallery of Art—West Wing           |
| 3 Verizon Center                                      | 9 Smithsonian Natural History Museum          |
| 4 Mt. Vernon Square and the City Museum of Washington | 10 Smithsonian American History Museum        |
| 5 Washington Convention Center                        | • Restaurants (79 within a five-block radius) |
| 6 National Archives and Navy Memorial                 |   |

## LUXURY AMENITIES

Stunning views of Washington

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14 Concierge Levels featuring continental breakfast in the morning, hors d'oeuvres in the evening and beverages all day

### Aura Spa

- Body wrap
- Facial treatments
- Fitness counseling
- Massages
- Steam room

### Bang Salon

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- Body scrubs
- Body wraps
- Massages
- Waxing

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- Free weights



- Strength equipment
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Food & drink on premises:

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- President's Sports Bar
- Liberty Market
- TechWorld Food Court (includes Fresco Italian Eatery, two delis and a gyro market)
- Starbucks

Discount airfares to/from Washington, DC have been announced by several airlines. Book your flight now!