

# Technology solutions from HP Enterprise Services drive continued success of Everest Funeral Planning



Partnership evolves from designing solution platform to leveraging the latest in technology advances



**“HP transformed our dream into a reality and continues to foster Everest’s growth through innovation and the solution’s inherent scalability. If it weren’t for HP, Everest wouldn’t be here.”**

—Mark W. Duffey, CEO and President, Everest Funeral Planning and Concierge Services

## HP customer case study

Leveraging technology expertise from HP Enterprise Services allows company to realize an innovative, technology-enabled business model

**Industry**  
Consumer Industries & Retail

## Objective

Revolutionize the funeral industry by launching the first nationwide funeral planning and concierge service

## Approach

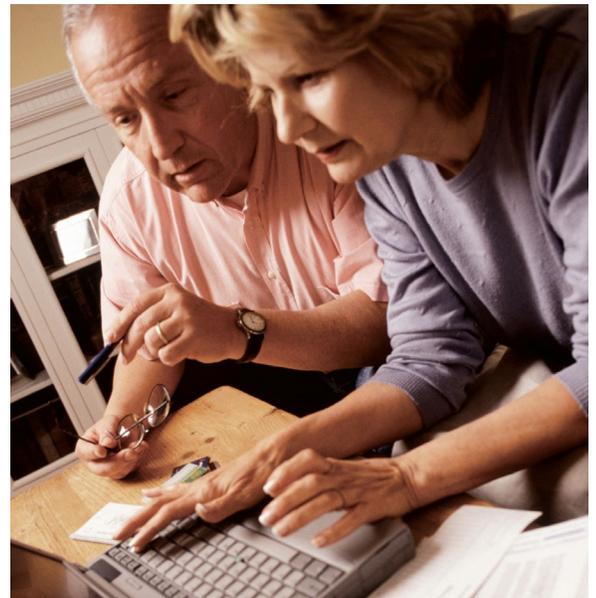
- Collaborated to develop a business strategy and model
- Designed, deployed and managed an all-inclusive funeral planning solution from scratch
- Created a temporary site, complete with a 24 x 7 customer care center
- Managed price information for more than 20,000 funeral homes nationwide
- Built an end-to-end operations environment, including a CRM system and Web portal
- Provided ongoing management and technology guidance, including migrating to new cloud-based CRM technology when it became available

## IT improvements

- Delivered first-of-its-kind funeral planning solution from start to finish, enabling company to launch its business and achieve its business vision
- Provided scalability and as-needed technology upgrades to meet growth and demand while driving continued operational improvements

## Business benefits

- Enabled company to leverage critical technology platform and resources without having to maintain technology resources in-house
- Predictable technology cost structure and cost-effectiveness, along with up-to-the-minute availability of business data, gives management the tools it needs to make sound decisions and plan effectively



The power of technology lies in its ability to simplify and streamline tasks, freeing people to focus their time and energy on other priorities. And as companies find ways to harness this power, they often transform the consumers’ expectations and drive new standards of service within their respective industries.

Take Everest Funeral Planning and Concierge Service for instance. In an industry that has seen little change over the last 100 years, Everest decided to revolutionize funeral planning services in the United States and Canada by giving consumers an on-line tool, backed by 24 x 7 phone support from Everest advisors, to let them plan and document their last wishes.

For Everest to realize this model, however, it needed a technology partner able to design and build the funeral planning solution. That partner was HP Enterprise Services.

## Complete solution, from business strategy to start-up

Everest was founded in 2001 by a group of funeral industry professionals who shared a vision: to create the first nationwide funeral planning and concierge service.

Typically, families have to make funeral arrangements within 48 hours of the death of a loved one. This often involves making complex, costly decisions during an emotional, stress-filled time. Everest set out to simplify and streamline this process by enabling consumers to plan and document their last wishes in advance, thus sparing families from having to make difficult, costly decisions while they are grieving. The service also mirrors a growing trend toward personalizing one's final services, while sparing loved ones the burden of funeral planning at or near the time of death.

To realize this vision, however, Everest needed a sophisticated technology platform, and the company did not have the resources in-house to build or sustain that platform itself. So instead, it selected HP Enterprise Services as its technology partner.

The first project Everest entrusted to HP was to design, deploy and manage the all-inclusive funeral planning solution that would serve as the foundation of the company.

Because Everest was a start-up, HP built the entire solution from scratch, working hand-in-hand with Everest, to address all aspects of the company's business strategy and model. The core of the solution is an HP-built customer contact center that provides consumers with on-demand research capabilities and consultation services. In addition to the customer contact center, HP built an end-to-end operations environment that included a CRM system and Web portal for storing funeral planning tools and other funeral-related information.

Driven by HP's leading-edge technology tools, the all-inclusive funeral planning service launched as the first of its kind. Consumers can sign up for the Everest Funeral Package on the Everest website or through one of Everest's life insurance partners who offer individual and group life insurance policies that include Everest's services. Clients gain access to online funeral planning tools, informative documents and contact center advisers who can help customize their funeral services to their personal needs and wants.

In addition to these online tools, Everest advisors provide 24 x 7 client consultation services from the HP contact center. These advisors are equipped with the compassion, knowledge and resources to help clients and their families craft personalized funeral services to fit their budgets and personalities. They work with clients to ensure every last detail is resolved in advance or at the time of need, depending on the client's wishes.

When a death occurs, a licensed Everest funeral director assists clients in selecting a funeral home that meets their needs. Then, at the direction of the family, Everest works directly with the funeral home to communicate and coordinate final arrangements on their behalf.

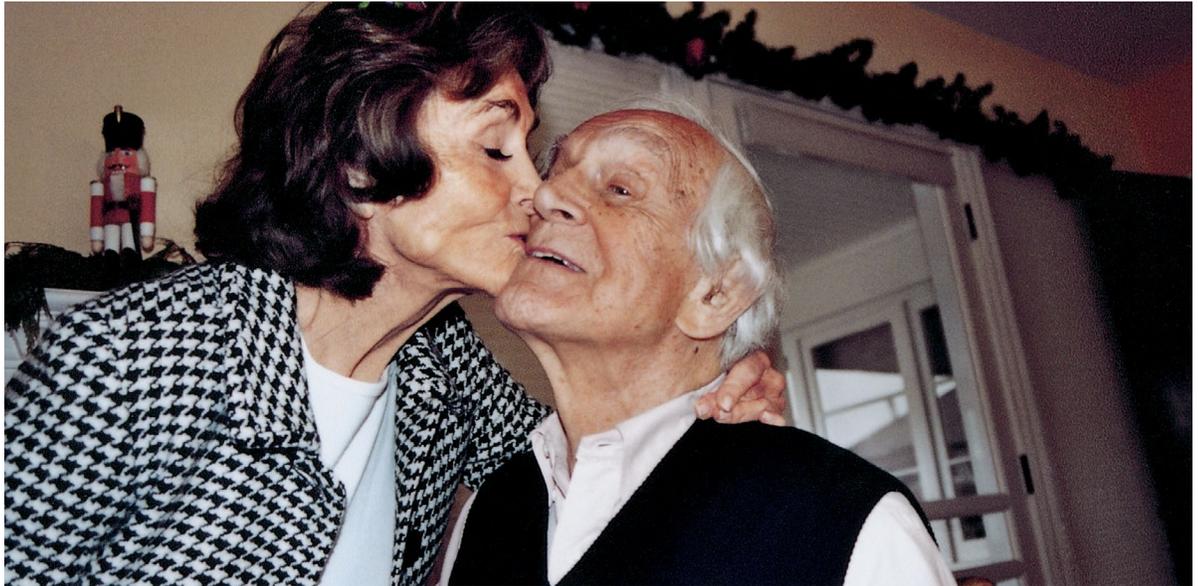
## Customer solution at a glance

### Primary applications

- Technology outsourcing

### HP Services

- Applications Development Services
- Applications Management Services
- Contact Center Outsourcing Services
- Enterprise Cloud Services for Microsoft Dynamics CRM
- Enterprise Applications Services for Microsoft Dynamics CRM
- Portals and Collaboration Services
- Web Hosting Services



## Enhancing solution capabilities as technology advances

One of the key requirements for the funeral planning solution was scalability: Everest must be able to ramp up contact center resources to meet increased demand, as well as expand its database refresh operation to accommodate millions of new clients with as little as a 30-day notice. Partnering with HP ensures that Everest can seamlessly tap additional technology resources within hours or even minutes if needed.

HP Enterprise Services also guides Everest as technology evolves, ensuring that the company can leverage advancements in the hardware and software that are critical to its enterprise. Recently, for example, HP Enterprise Services advised Everest to migrate from Oracle PeopleSoft Customer Relationship Manager (CRM) to Microsoft Dynamics® CRM. Everest agreed to the migration, which HP's Dynamics CRM practice performed in a process that was transparent to Everest and its end-user clients.

The new CRM tool, which is delivered via a Software as a Service (SaaS) model in HP's virtual private cloud, has delivered a number of significant benefits to Everest.

The Microsoft Dynamics CRM software's out-of-the-box functionality eliminated the necessity for expensive customization to meet Everest's needs. Because it is

hosted in a virtual private cloud environment, it satisfies Everest's requirements for pricing predictability and security, while ensuring that it can be scaled out quickly in the future.

Generating reports from the old PeopleSoft application was cumbersome and required programming skills. The reports always took several days to generate; the data was already old by the time it was in the hands of Everest managers. With the Microsoft Dynamics CRM solution, however, Everest can generate its own reports through the software's simple, self-service menus. This has reduced the costs associated with managing the CRM function by 50%. Self-service reporting also means that Everest has instant access to the latest data about its business, which supports better business planning and more agile decision-making.

The performance of the new CRM application is faster, and navigating it requires fewer mouse clicks. Microsoft Dynamics CRM features the intuitive and familiar Microsoft® Outlook® interface which drives a high user adoption and a short learning curve. With the old PeopleSoft system, it took several hours of training just to learn how to navigate the interface. With the new Dynamics CRM software, anyone could come up to speed within an hour or so. This helps ensure that if Everest needs to grow, it can bring new hires on board more quickly.

## Transforming an industry through vision—and technology

Since its founding, Everest has transformed the funeral planning industry in numerous ways. Through its Everest PriceFinder service, HP manages price information for more than 20,000 funeral homes nationwide, which clients or their families can search by ZIP code online. The PriceFinder tool allows clients to compare detailed pricing information for up to eight funeral homes at one time, producing a comprehensive report in just minutes. This has driven new visibility into the funeral services industry, compelling funeral homes to become more competitive in their pricing.

Everest builds on this visibility by negotiating better prices on behalf of clients, allowing them to purchase individualized services rather than the more expensive, general one-size-fits-all funeral packages of the past.

“I made a phone call to determine what the cost would be for the service and had been quoted around \$10,000,” notes Kevin Whalen, Everest client. “Once we visited with Everest, it became clear that we could have the whole service for between \$1,200 and \$1,500. So the savings were incredible for us. More importantly, it was much less emotional.”

Perhaps most importantly, Everest has helped create a more positive, customized and convenient customer service experience for consumers as they manage one of the most difficult and stressful life events: a striking example of how entrepreneurial visionaries can leverage the technology expertise of HP Enterprise Services to make their visions a reality.

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