



*Speak softly I'm Heart of Hearing*

# TASK ORIENTATION V. RESULTS FOCUS: HOW CHECKING THE BOX ISN'T ENOUGH

This educational seminar will introduce funeral professionals to the differences between task orientation and results focus. We will also discuss different behavior profiles and their default focuses. This will help the funeral professionals: a) identify opportunities to improve employee management and training, b) create new solutions to persistent problems, and c) take more effective actions to prevent lawsuits.

**Contact hours:** 1 Law

When attended continuously and in full, this 50-minute course provides the professional one credit hour. See Pub. Health Law §3429.

## **Course Outline**

### I. Introduction of Speaker and Presentation Goals

#### A. Nance L. Schick, Esq.

1. Funeral Industry Attorney since 2004 with experience as litigant, plaintiff's attorney, defense attorney, and mediator
2. Continuing education instructor in the industry since 2011
3. Survivor of sexual assault, sexual harassment, and more

#### B. Disclaimer

This course provides a general overview of common legal missteps due to the wrong focus and how this might affect your work. **It is not legal advice, and I am not your attorney.** If you require information or advice applied to your unique situation, please make an appointment to discuss it with an experienced attorney of your choosing.

#### C. Course Goals

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1. Identify opportunities to improve employee management and training
2. Create new solutions to persistent problems
3. Take more effective actions to prevent lawsuits

## II. Introduction of Topic and Key Presentation Points

- A. You probably have people in your funeral home who have different default focuses. Knowing this and identifying them will help you determine how to train and manage them.
1. DISC Profiles help identify focus, strengths, and weakness, all of which can change.
    - a) Dominant (Task-oriented)
    - b) Influencing (People-oriented)
    - c) Supportive (People-oriented)
    - d) Cautious (Task-oriented)
  2. Goal Setting and Training typically focus on results. They invite creative solutions and accountability.
    - a) Maximize the sale
    - b) Make the families comfortable
    - c) Collect timely payment
    - d) Protect others from harm
  3. Action Plans and Checklists focus on tasks, which don't always meet the goals. They can also provide people excuses for not meeting goals.
    - a) Complete specific forms for each sale
    - b) Provide a minimum of 25 chairs, arrive 1 hour early, communicate by their preferred means, etc.
    - c) Submit completed contracts to the bookkeeper by the end of the business day
    - d) Clear and salt the walkway before opening
- B. How might these increase or reduce your risks?

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NOT SO FUN FACT: The most common matters currently pending against funeral homes in New York arise out of slips and falls on premises owned or controlled by them.

1. Alleged slip and fall on ice due to water for handwashing in conjunction with a Jewish funeral (pending Pick case)
2. Alleged fall on uneven pavement or poorly maintained (multiple pending cases)
3. Assuming the slips and falls occurred, could a focus on the desired result have helped identify potential hazards that task orientation might not?
  - a) Clear and salt the walkway before opening (Task) v. Protect others from harm (Result)
  - b) Walk the premises and check for hazards (Task) v. Protect others from harm (Result)
  - c) Report all hazards to management immediately (Task) v. Protect others from harm (Result)

C. Other applications

1. Errors with remains (e.g., casket opening, wrong body, release to wrong survivor)
2. Motor vehicle accidents
3. Non-payment issues (e.g., contract disputes, taxes)
4. Hostile work environment complaints

III. Review of Key Presentation Points

- A. You might be training and managing some of your employees ineffectively.
- B. You might be missing opportunities to resolve persistent conflicts.
- C. You might be putting your funeral home at unnecessary risk.

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