

The HR Mixtape: Hosted by Shari Simpson with Guest Justin Clifford, CEO of Bereave

Announcer:

You're listening to the HR Mixtape. Your podcast with the perfect mix of practical advice, thought-provoking interviews, and stories that just hit different so that work doesn't have to feel, well, like work. Now, your host, Shari Simpson.

Shari Simpson:

Joining me today is Justin Clifford, CEO of Bereave. Justin founded Bereave to be a mission-driven company helping people navigate loss with practical tools and compassionate support inspired by his family's experience. Before we begin today's conversation, I want to acknowledge that this episode touches on sensitive themes, including loss and grief. While our focus is on how employers can best support their people through these difficult moments, I want to be mindful that this subject may feel personal for many listeners. Please take care of yourself while listening. Pause if you need to, or come back when you're ready. Justin, thank you so much for jumping on the podcast with me today.

Justin Clifford:

Heck yeah, Shari. Any time for you. And also, I adore what you just said. Thanks for doing that.

Shari Simpson:

Yeah, of course. You know, I had the wonderful opportunity of being introduced to you, I think almost a year ago now and the work that you're doing. So I'd love to just set the stage by maybe you sharing a little bit about your background, your company and the work that you do.

Justin Clifford:

Sure. Background is wonky. I mean, I used to be a second grade teacher. I'm

now the CEO of a death tech company, right? Like, I don't know. But I got introduced to sales and sales leadership along the way and have just become addicted to solving business problems. And as Bereave kind of enters my life, there's this kind of combination of a business problem that's happening at work along with a very personal problem. And those problems live essentially in two different worlds and there's very little overlap outside of a few words that are typically written in a handbook. And that is causing problems for people as they move through their journey. even from an employee experience perspective, but also their grief journey, that's creating problems for employers that frankly they don't know about. They don't know a lot of the things that are happening because data is rarely kept because we're not talking a ton about it. So being able to really bring those two worlds together and to help employers help their employees in some of the moments that matter the most in their lives is really what we're after.

Shari Simpson:

You know, Justin, I think that this topic is just hard all around, you know, and so if you didn't kind of pick up from Justin's intro. So where he sits and fits is in this space when you've had death in an organization, then that could be death of an employee. It could be an employee's experiencing death. It could be in the line of work that employees are doing, that they have exposure to those types of things. And your company provides, and I've never heard that term before, death tech. So that's a new one to me, provides that for organizations. Can you describe just a little bit about what that is, that space?

Justin Clifford:

Sure. Yeah. I use the term death tech kind of in jest to some degree, but it actually, I mean, there are publications that you would recognize that are using that phrase. We probably sit somewhere closer to employee experience tech right now is kind of where we would sit. But the idea, and I'll tell you the two reasons that we built what we built, is that when we were figuring out like, hey, there is this thing that happens after people lose a loved one. There is this system, there are these processes that are so difficult to navigate. You have to do it in a highly emotional state in most cases. And there's really no place to turn. And when we started looking at this, that's what we kept

hearing from people. We get, I mean, Shari, we've got thousands of stories from strangers, mostly via LinkedIn or email that have basically said, when we lost our person, we didn't know where to turn. Conversely, when you continue that conversation, Unscientifically, I haven't really kept track, but probably nine out of 10 times, people would also say, here's what my manager did. Here's what my employer said. And then they would talk about the rest of their story. And we're not, at that point, not asking about work at all. So they didn't know where to turn, and here's how work impacted my journey. So we took those two things, dug in with HR teammates, or former HR teammates, HR folks that we knew, we dug in with people that were managers of people, long-tenured managers of people, and said, hey, what do you do in this situation? At the same time, we asked people what they did when they said they didn't know where to turn. And it turns out, all of them were just, just kind of gave a big shoulder shrug. And so we knew the opportunity was there to create something for employees and their families. And we knew the opportunity was there to create something so that the employer knows what to do. So we created basically playbooks, essentially, for both parties so that they can make the proper considerations for the situation that they are in. And people have told me and have told us, and it's like, hey, you can't SOP Dash. I agree, you can't, it's so unique. But because we have this luxury of so many people sharing what has gone well and what hasn't, just by listening, we can create the considerations that need to be taken. And you might say, this consideration is not applicable to me, or you might say, most of these are. And you might go through two different ones, three different ones in a year, and they're all gonna be different. So the idea is that we get people in a highly emotional state, help them understand what to do and how to do it, sometimes even who to do it with.

Shari Simpson:

As you were going through your research phase, what were some of the things that kept coming up that you were surprised at that? Let's start from the employee perspective that you can consistently heard, like, I wish I had this as a resource or I didn't need to, I didn't know where to go for this. What are some of those big bucket items that kept coming up?

Justin Clifford:

Yeah. I mean, right off the bat was like, how do you plan a wedding scale event in 72 hours? Right. If you're planning a funeral at a funeral home and the funeral home is asking you to make literally 150 decisions, I mean, think about planning a wedding in 72 hours, and the bride and groom aren't there, but you have to plan the wedding that you think they want. Right. That's the kind of guilt that kind of shows up. So from planning a funeral through understanding like, Hey, I'm a new person without that person or those people. How do I go about my life? Like, what is, what are these emotions that I'm feeling? I think it might be grief. How do I handle that? Not just right now to go back to work, but like in perpetuity and then all of the paperwork that comes along with trying to tie up somebody's personal affairs. It takes on average, and the latest data I think is on average an hour a day for 15 months to close an estate. I've heard upwards towards two years on average. And you think about that from a work perspective, that's an hour a day for that long. That is a part-time job. That's five hours a week. If you're doing it just Monday through Friday, but that's typically when the credit card companies are open and the banks are open and the courts are open and the attorneys are available. It's during traditional work hours in most cases. So all of those things, I would probably say those are probably the three biggest buckets. And then there's the whole underlying bucket of like, You know, how do I deal with work? Do I need to go back? I was told to take all the time I'm given. Can I really do that? Did they mean that? And now, am I getting paid? And all these other pressures that are controllable, with a little bit of preparation and planning, all these other pressures tend to exacerbate that life that somebody is now trying to navigate.

Shari Simpson:

Well, and you, as an HR professional who's written many a bereavement policy over the years, they never feel right. I'll be honest. They never feel right. There's never the right amount of time to give somebody. There's never the right circumstances, the right way to define who you get what type of leave for and how much time, you know, I think about policies I've written in the past that it's like, well, if it's an immediate family member, like your spouse, you get five days, five days, five days to recover from losing

potentially the love of your life, your, your rock, your partner, you know, however you want to describe that person. And that's only one example specific to, to, I mean, it doesn't have to be your spouse. Your special person can be anybody, right? It could be your pet. It could be like, you know, and so the complexities of that, as you transition from the view of the employee to the view of the employer, what were some of the things that started to come to life? Because this is complicated. This is a complicated topic because at the end of the day, businesses exist to make money and run their business. That is the reality. We can do that compassionately, obviously, and not forgetting that humanity is part of being human. So what did you start to hear from employers?

Justin Clifford:

That they didn't know what to do, that their bereavement policy, their EAP and sending flowers was their response. And the bereavement policy hadn't been touched in years. And it just kind of got rubber stamped every time they did a handbook because frankly, I don't think people wanted to talk about it and they didn't want to address their own mortality and talk about something that was as difficult as it is. And I get that. I get it. But when people are looking at things like the employee experience and they're looking at retention, they're looking at attraction, the moments of hardship, death or not, are the moments where you need to decide, are we going to show up in the way that our values spouse us to show up? Are we going to show up in the way that is reflective of what we say in our careers page? Those are the moments that are so much bigger than that one employee and whether that person is retained or not, and whether or not that next person comes to the door. The ripple effect is massive. People are watching how you show up in these moments, right? It's one thing to have all of these benefits and policies around the celebratory moments of life. Love it. Keep doing it. But if you're going to do that, you've got to look at what life really is. And it's not just celebratory, unfortunately. And so taking a step back, and I feel like there are these rooms, and I haven't been in them, but I feel like there are these rooms where executives are sitting around a table and they're talking for hours about the relationship. And they're assigning the amount of love somebody has two days on a policy and I feel like this is happening. And I would just encourage them

to take a step back and ask, why do we have this policy? What do we want to get out of the policy? Is it to protect us from employees that we think are going to lie to us? Or is it for retention and attraction of employees and probably productivity of employees? So the easy thing to do in a policy situation is to align this with parental leave, which has made astounding strides in the past decade, long way to go still, but lots of strides. But when people put that on their careers page as a benefit to working there and they don't address what happens if that child dies. And I say that because I've seen the policy go from being a parental leave to a bereavement leave in a matter of hours and what happens to people when that happens and when their leave is changed. But if they're not addressing the other side of it, they haven't thought through not just the employee experience, but they haven't thought through the life experience as it relates to being an employee at their company.

Shari Simpson:

And that so highlights the shift that we've seen in the wellness space around siloing different buckets of wellness. So financial health, you know, medical vision, that kind of stuff into holistic wellbeing. Right. And part of thinking about holistic wellbeing is the holistic employee. You know, we talk about employee life cycle all the time. Well, that involves the actual life cycle. And I thought it was interesting kind of you bringing up, like, as we think about that, why are we creating a policy? You might be in an organization that actually says, you know what, we are creating the policy to see why from a perspective. That's okay as a business, but you should be having those conversations. What does your policy exist for and does it align with your values? I love the expression or the thought around where people spend money, where your company spends money actually shows what you value and how you invest in things. I want to ask some kind of tactical questions as I think about some different scenarios where resources like this would be very helpful. So, you know, I think, you know, those in the HR space are probably familiar with what happened at Wells Fargo where, you know, an employee passed away at work and went unnoticed for a couple of days. I think about that moment with such heartbreak for so many different people. Obviously, the woman that passed away and her family and her co-workers. And

selfishly, I think about the role of the HR person in that moment and the stress and complexity that they must be experiencing. What have you found to be, you know, in moments like that, the organizations that are doing it the right way, handling it the right way, approaching things the right way. And I'm, I'm going to use the term right way loosely, because like we said at the very beginning, every scenario is unique. There's not, you know, one size fits all.

Justin Clifford:

Sure. I think there are two, I think there are two big plans or two big, two big buckets here, since we're talking in buckets. I think the first bucket is planning and preparation. People have to have a plan. I talk about it a lot. We provide free plans to people just to make sure that people have a plan. It's like anything that you would plan for. What happens when your team is about to miss quota? Do you have a plan for that? What happens when your team has a higher retention or a higher customer churn this quarter than anticipated? Do you have a plan for that? Most companies do. It's typically after the first time they miss, right? And they're like, oh, we should have a plan for that. But having a plan for these moments, and again, you're not going to plan for an employee passing away at their desk and going unnoticed for several days. That's not what you should plan for. But you can plan for 80% ish, like the saying says, plan for the things that are likely to happen. Employee says, I've lost somebody that I love. What do you do? Not what do you say exactly and what do you think you'll do, but what do you do? Write it down. These are the steps we are going to take. This is who is going to take the steps and this is when they are going to take the steps. Just write it down. So having a plan. The second thing is communicating that plan to the organization and having that conversation on a regular basis during onboarding, quarterly, during, you know, all hands, whatever the cadence needs to be. And this is where you start to weave this a little bit into your culture of like how we show up as a company, how we will show up for you. And we basically take that plan. It doesn't have to be a death plan, right? It can be a hardship plan. Life happens. Here's the plan that we have built. And when things go sideways for you in your life, here's what's going to happen. Just giving people that benefit of understanding gives them more space to work and more space to feel cared. And so when things do go a little bit haywire, they feel safe to go do the thing

because they know how this company is going to show up. As long as they do what they say, that's probably a third bucket, do what you say you're going to do. But they have that safety to understand what happens now at work, which is such a stressful driver.

Shari Simpson:

Having a plan like that, it seems so logical and yet I can tell you I've never worked in an organization that had a very detailed plan like that, almost like a checklist. As you were talking, I was thinking about all the different pieces, right? The communication with the employee, the communication with the organization, the communication with potentially benefit providers, like an organization like yourself. You know, how do you think about the support you're going to provide? Is it just EAP? Is it a grief counselor? Is it you have to pull the team together? How many other co-workers potentially knew this person that passed away? You know, my husband's a firefighter. And so obviously I have that frame of reference. You know, they're exposed to death in a completely different way. And some of those calls are really traumatic. And so what does that look like? What does that grief support look like for somebody that isn't a loved one, but yet you are still experiencing those different things.

Justin Clifford:

Totally. Yeah. And I mean, I think that kind of points to something interesting that we are starting to see is that medical groups, hospital groups are starting to come to us and say, hey, our employees are around this every day. And I'm worried about that. And we don't do a whole lot for that. And then there's, we've got clients that are venture backed, high growth type companies, software companies that don't deal in that world, but are still saying, we know this is a part of life. and we're coming up short. And we know that because we just had a couple of employees die in the past 90 days and it feels like we should do more and could do more and could do better. So thinking about where people are, I think there's variances, of course, of the resources that are probably available and needed. But in general, it is part of life. Your work might actually perpetuate your exposure, right? But at the very baseline, which I would argue like firefighters or nurses, ER doctors, they are very far

from the baseline of like regular life. But even at the baseline, if you can just think about how life works and understand how prevalent death is, understand the impact of loss around a death or the impact of grief around a particular loss, that'll start to inform some of the decisions that you can make as it relates to the size of your population at work.

Shari Simpson:

And that plays into, you know, all the conversations we've had around, you know, leadership development, especially around emotional intelligence. You know, nothing In my opinion, right, my experience, nothing is worse to me when you hear the thoughts and prayers comment. For me personally, again, I'm speaking personally, it just doesn't hit for me. It's like, okay, cool. I would rather have you just sit in silence next to me while I grieve than say that thing to me. But having the right language and having that conversation in advance, right, as an organization, then you kind of have those things. You know, I think we could go on and on about all the different things that, you know, organizations need to consider. I guess I will ask you, you know, what is maybe the one or two things, if you're doing this immediately stop, like the things that you're like, I cannot believe companies are still doing this. And then maybe the one or two positive things that like, Hey, I've seen companies do this and they're, they're, they're nailing it in this area.

Justin Clifford:

Yeah. I love the question. I don't think we have enough time to talk about all the missteps that we hear about, right? We do hear some beautiful things and a lot of them are just gestures that are specific to a situation. One of the things that I would probably start with is that, like I said, companies just don't have a plan. They haven't considered it. They haven't considered hardship, right? I would suggest that executives take a look at what their careers pages say and ask themselves, do we show up in the way we say we're going to show up? That's baseline foundational stuff, right? Those executives probably don't even know what their careers pages say in a lot of respects. They need to figure that out. I think the other component is that when we hear a lot of bad reactions from a workplace or from managers, it's typically from people who either haven't experienced much loss in their life and don't know, don't

know what it is, don't know what it feels like. They've never been trained. So the best organizations out there are doing the opposite. They are training their managers on process and procedure. They are training their managers on empathy as a skill and compassion as a skill. They're teaching, they're helping their managers with things like how to have difficult conversations or how to identify potential mental health issues. distress, right? Those are the things that managers, I mean, I've been a people manager for 15 years and the only time that I was ever, and I worked for one of the most compassionate, arguably best cultures that have ever been created here in a company called Lessonly, and even they didn't train me how to do those things, right? Managers don't get trained on much. But if you can train them on some of those foundational things, it will translate to helping that employee experience significantly. So I know I didn't really answer the question in like one and two and one and two, but like, here's the bad stuff, do the opposite. That's what we see as the good stuff. And there's usually some people as a part of the organization that have been assigned, maybe it's part of their job, maybe it's their whole job, but that have been assigned to thinking about life outside of the walls of work for their employees.

Shari Simpson:

Justin, such good examples and advice for our audience. If they wanna learn more specifically about your company, how do they get in touch with you?

Justin Clifford:

Yeah, thanks for asking. bereave.io is our website. If you're on LinkedIn, you can just look up Justin Clifford on LinkedIn. I'm kinda loud, I'm slightly more obnoxious, even more than I was today on LinkedIn because I can hide behind a keyboard, right, and it makes me stronger. But that's, you know, we're happy to provide information, resources. You don't have to become a customer to understand the impact and be able to do better than what you might be doing today, even though I know you're trying hard.

Shari Simpson:

Thanks, Justin, for such a great conversation.

Justin Clifford:

Sure. Thank you, Shari.

Shari Simpson:

I hope you enjoyed today's episode. You can find show notes and links at thehrmixtape.com Come back often and please subscribe, rate and review.