

Job Description and Person Profile

Business / Support Service	Shared Service Centre
Job title	Plan Administrator
Grade	F
Job family	Support Services
Reporting to (job title)	Plan & Debt Management Team Lead
Number of direct reports	0
Number of indirect reports	0
Budget responsibility	0
Contacts	<p>Managers and colleagues from across the society and third-party providers.</p> <p>Primary internal contacts Funeral homes</p> <p>Primary external contacts Funeral plan providers & Funeral plan customers</p>

a) Job purpose
<p>The Plan Administrator will provide an effective and efficient service in accordance with agreed performance and quality standards.</p> <p>Performance is measured internally against society, department and personal KPIs.</p> <p>External measures are applied and enforced by the FCA (Financial Conduct Authority)</p> <p>The role will be responsible for the accurate data entry of pre-paid funeral plans into the Plan Management System as well as performing plan maintenance that includes processing customer amendments, cancellations, and redemptions.</p> <p>The individual will also be responsible for handling internal and external queries and managing customer communications in line with agreed procedures.</p> <p>Guidance provided must ensure the society is not exposed to Anti Money Laundering, Corporate Criminal Offence of Financial Crime risk.</p> <p>The individual will also be required to support the delivery of the Finance Shared Services vision and wider CEC Group visions.</p> <p>The individual must have strong attention to detail and accuracy of data input combined with a customer service focus to ensure all customers receive the agreed level of service.</p> <p>The individual must be able to confidently liaise with internal and external customers and third-party providers whilst also supporting other colleagues in the delivery of team objectives - this may include working on projects and contributing to the continuous improvement of processes.</p> <p>Although flexible, the role will require some office-based working from our Head Office in Lichfield.</p>

b) Key accountabilities

- Management of the day-to-day operation of the pre-paid funeral plan processes as part of providing a world-class-standard transactional operation
- Support the implementation of the Finance Shared Services vision
- Work towards individual goals and objectives that are aligned to those of Order to Cash, Finance Shared Services, the wider Shared Service functions and the CEC Group
- Regular communication with key internal customers on pertinent issues impacting the management of pre-paid funeral plans and wider processes
- Delivery of all functions within service levels agreed with the business
- Escalation of business-critical issues to the Plan & Debt Management Team Lead

c) Main responsibilities

- Provide a world-class-standard support service for the management of pre-paid funeral plans
- Recognize and intercept activities that contravene Anti Money Laundering, Corporate Criminal Risk and Financial Crime policies
- Understand and adhere to FCA regulations
- Recognize vulnerable persons and understand the impact on plan management processes
- Ensure work is delivered in line with agreed standards, processes and procedures:
 - Data entry of pre-paid funeral plan applications in the system
 - Set-up of instalment plans by direct debit
 - Update funeral plan particulars in the system in response to customer requests
 - Ensure all plan amendments are supported with comprehensive notes in the system
 - Issue mandatory paperwork to funeral plan customers
 - Take credit card payments over the telephone ensuring PCI compliance
 - Raise customer refunds
 - Process redemption claims and raise customer invoice
 - Support MI Reporting and Compliance Monitoring
- Ensure SLAs are understood as well as their impact on the day-to-day workload
- Provide exceptional customer service to help ensure the Plan Management team has an excellent reputation with the CEC Group
- Ensure that all queries allocated to the individual are resolved within SLAs. Escalate complex customer complaints or enquiries as required.
- Maintain effective records to ensure all dealings with customers are properly recorded and in accordance with FCA requirements

d) Measures of performance	
<ul style="list-style-type: none"> • KPIs, SLAs and personal objectives are achieved • Pre-paid funeral plans and subsequent updates are recorded accurately • Accurate and timely completion of documentation in a regulated environment • Satisfactory performance against quality scores • Positive internal and external feedback 	
e) Person profile	
Essential qualifications	Desired qualifications
<ul style="list-style-type: none"> • GCSEs grades A-C in English and Maths 	<ul style="list-style-type: none"> • FCA certified
Essential experience	Desired experience
<ul style="list-style-type: none"> • Experience of working in a demanding environment • Excellent analytical, communication and IT skills • Evidence of delivering or contributing to continuous improvement initiatives within a transactional processing environment • Experience of Microsoft Excel, specifically vlookup and pivot tables • Excellent customer service skills • Self-motivated and enthusiastic • Able to effectively organize and plan time 	<ul style="list-style-type: none"> • Experience of working in an FCA regulated environment
f) Competencies / behaviours	
<p>Future direction</p> <ul style="list-style-type: none"> • See the bigger picture • Challenge, change and improve • Make effective decisions <p>Engage people</p> <ul style="list-style-type: none"> • Lead and communicate • Collaborate and partner • Build capability <p>Deliver results</p> <ul style="list-style-type: none"> • Customer focused ways of working 	

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<ul style="list-style-type: none">• Individual accountability• Agility and reactivity	
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