

Role Profile - Funeral Plan Arranger - Field Based

Role Levelling

U2

Purpose

To arrange pre-paid funeral plans for new and existing customers within a funeral home or remotely via video calling or telephone, to ensure continued growth in funeral plan sales, ensuring compliance with the Financial Conduct Authority regulations for retaining, growing, and maximising all opportunities with potential customers through the introduction and management of campaigns and initiatives.

In addition to the selling of Funeral Plan sales, Funeral Plan Arrangers will also ensure customers' needs are met in relation to planning ahead for other Funeral services including memorialisation, wills and probate and legal services

Key Relationships

Customers, Colleagues, Members, Customer & Marketing, internal stakeholders, and third-party plan providers

Measures of Success

- Ownership of individual Funeral Plan sales, generated through various sources.
- Management of new and existing funeral plan campaigns, maximising all opportunities with potential customers using a consultative approach.
- Provide leads for new campaign opportunities to the Funeral Plan Manager.
- Maintain all customer records on the appropriate internal systems.
- Ensure all funeral plans are processed and completed in accordance with set Service Level Agreements and in line with the Financial Conduct Authority requirements, acting if potential issues arise and communicating corrective action to all stakeholders
- Resolve all customers enquiries effectively, professionally, within SLA and handover any complaints to the Customer Service team to independently review
- Act in compliance with the FCA's Conduct Rules, and notify line manager of any issues or breaches which could impact this
- Building relationships with Introducer Appointed Representatives to assist with enquiries around funeral plans
- Support local community events and initiatives to maximise opportunities as required.
- Promote an open and effective working relationship with all colleagues.
- Flexibility of working hours will be required to meet the needs of Customers
- To undertake any other relevant duties as requested.
- To adhere to, embed and comply with all Society Policies and Procedures

- Quality and Compliance Monitoring scores including accurate completion of customer plan paperwork and sales processes, key performance indicators and personal objectives are achieved.
- Training and ongoing assessments are passed
- Completion of 15 hours training and continuous development annually
- Internal & external customer feedback
- Adherence to all Society Policies and Procedures

Experience/ Qualifications Required

Essential

- Excellent listening and communication skills
- Experience of building relationships
- Self-motivated and enthusiastic
- Excellent organisation skills
- Excellent customer service skills

Desirable

- Previous experience of being FCA Certified
- Experience of working in an FCA regulated environment

NOTE: This is a Certified Role which will require additional checks