

## Job Description and Person Profile

<b>Business/Support service</b>	Trading
<b>Job Title</b>	Funeral Plan Arranger
<b>Grade</b>	TBC
<b>Job Family</b>	Funeral
<b>Reporting to (Job Title)</b>	Funeral Plan Manager / Funeral Plan Team Leader
<b>Number of direct reports</b>	0
<b>Number of indirect reports</b>	0
<b>Budget Responsibility</b>	N/A
<b>Contacts</b>	Customers, Colleagues, Members, Customer & Marketing, internal stakeholders, and third-party plan providers

### a) Job purpose

To deliver new business from 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

Accountability 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 all Funeral services including memorialisation, wills and probate and legal services

### b) Key accountabilities

- 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.

### c) Main responsibilities

- 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

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<ul style="list-style-type: none"> <li>• Building relationships with Introducer Appointed Representatives to assist with enquiries around funeral plans</li> <li>• Support local community events and initiatives to maximise opportunities as required.</li> <li>• Promote an open and effective working relationship with all colleagues.</li> <li>• Flexibility of working hours will be required to meet the needs of Customers</li> <li>• To undertake any other relevant duties as requested.</li> <li>• To adhere to, embed and comply with all Society Policies and Procedures</li> </ul>	
<b>d) Measures of performance</b>	
<ul style="list-style-type: none"> <li>• Quality and Compliance Monitoring scores including accurate completion of customer plan paperwork and sales processes, key performance indicators and personal objectives are achieved.</li> <li>• Training and ongoing assessments are passed</li> <li>• Completion of 15 hours training and continuous development annually</li> <li>• Internal &amp; external customer feedback</li> <li>• Adherence to all Society Policies and Procedures</li> </ul>	
<b>e) Person profile</b>	
<b>Essential qualifications</b>	<b>Desired qualifications</b>
	<ul style="list-style-type: none"> <li>• FCA Certified</li> </ul>
<b>Essential experience</b>	<b>Desired experience</b>
<ul style="list-style-type: none"> <li>• Excellent listening and communication skills</li> <li>• Experience of building relationships</li> <li>• Self-motivated and enthusiastic</li> <li>• Excellent organisation skills</li> <li>• Excellent customer service skills</li> </ul>	<ul style="list-style-type: none"> <li>• Experience of working in an FCA regulated environment</li> </ul>
<b>f) Competencies / behaviours</b>	
<b>Lead</b>	
<ul style="list-style-type: none"> <li>• Shows passion and commitment in delivering personal and team goals, with accountability and flexibility</li> <li>• Overcomes challenges and shows perseverance, learning from the</li> </ul>	

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<p>past/mistakes quickly</p> <ul style="list-style-type: none"><li>• Creates an exciting vision and works hard to make that a reality</li></ul> <p><b>Learn</b></p> <ul style="list-style-type: none"><li>• Is self-aware, demonstrates resilience and seeks out opportunities to develop</li><li>• Embraces new initiatives/developments and shows an eagerness to try new things</li><li>• Identifies opportunities and bold solutions, using internal and external insight to shape work</li></ul> <p><b>Care</b></p> <ul style="list-style-type: none"><li>• Shows respect, support, empathy and openness to others, building relationships that create a foundation for getting things done</li><li>• Proactively manages own wellbeing and supports others to do the same</li><li>• Collaborates and influences to move work forward quickly and effectively</li></ul>	
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