

Purpose	Key Relationships
<p>To provide an effective and efficient service in accordance with agreed performance and quality standards.</p> <p>To 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 and cancellations.</p> <p>Also to be responsible for handling internal and external queries and managing customer communications in line with agreed procedures, and management of the day-to-day operation of the pre-paid funeral plan processes as part of providing a world-class-standard administration service</p> <p>The role will require some office-based working from our Head Office in Lichfield in line with our working from home policy.</p>	<p>Managers and colleagues from across the society and third-party providers.</p> <p>Internal:</p> <ul style="list-style-type: none"> <li>• Plan Sales Team</li> <li>• Redemptions Team</li> <li>• Shared Services</li> <li>• Finance Business Partners</li> <li>• Senior Commercial Accountants</li> <li>• Funeral Homes</li> </ul> <p>External:</p> <ul style="list-style-type: none"> <li>• Customers</li> <li>• Third Party Providers</li> </ul>

Key Accountabilities	Measures of Success	Experience/ Qualifications Required
<ul style="list-style-type: none"> <li>• Provide exceptional customer service to help ensure the Plan Management team has an excellent reputation within CEC FPL and the Central Co-op group</li> <li>• Escalation of business-critical issues to the Funeral Plan Co-Ordinator</li> <li>• Recognise and escalate activities that contravene Anti Money Laundering, Corporate Criminal Risk and Financial Crime policies</li> <li>• Understand and adhere to FCA regulations, notably the FCA Code of Conduct</li> <li>• Recognise vulnerable customers and understand the impact on plan management processes</li> <li>• Ensure work is delivered in line with agreed standards, processes and procedures:             <ul style="list-style-type: none"> <li>• Data entry of pre-paid funeral plan applications in the system</li> <li>• Set-up of instalment plans by direct debit</li> <li>• Update funeral plan particulars in the system in response to customer requests</li> <li>• Ensure all plan amendments are supported with comprehensive notes in the system</li> <li>• Issue mandatory paperwork to funeral plan customers</li> <li>• Take credit card payments over the telephone ensuring PCI compliance</li> <li>• Raise customer refunds</li> <li>• Support MI Reporting and Compliance Monitoring</li> </ul> </li> <li>• Ensure that all queries allocated are resolved within SLAs</li> <li>• Additional tasks as requested by line manager</li> </ul>	<ul style="list-style-type: none"> <li>• KPIs, SLAs and personal objectives are achieved</li> <li>• Pre-paid funeral plans and subsequent updates are recorded accurately</li> <li>• Accurate and timely completion of documentation in a regulated environment</li> <li>• Satisfactory performance against quality scores</li> <li>• Positive internal and external feedback</li> </ul>	<ul style="list-style-type: none"> <li>• Strong attention to detail and accuracy of data input</li> <li>• Customer service focus to ensure all customers receive the agreed level of service.</li> <li>• Ability to deliver performance against KPIs &amp; SLAs</li> <li>• Excellent telephone manner</li> <li>• Strong interpersonal and communication skills</li> <li>• Ability to work under pressure to tight deadlines and be resilient</li> <li>• Experience of working in a regulated environment</li> </ul>