

Role Profile - Funeral Advisor

Role Levelling

Purpose	Key Relationships
To carry out funeral arrangements for clients within the funeral home or at the client's premises, offer information on the products and services the business provides and ensure the highest standards of service excellence.	Internal and External stakeholders 3 rd party suppliers Regulatory bodies (CMA, IFSO, NAFD etc)

Key Accountabilities	Measures of Success	Experience/ Qualifications Required
<ul style="list-style-type: none"> Carry out the funeral arrangement with the clients completing all details accurately using the required documentation and obtain client signatures. Explain the full cost of funeral disbursements completing the estimate and obtaining a deposit. Offer the client the full choice of Society's products and services including coffin range, memorialisation products, floral and masonry. Keep the client and the Funeral Director informed of arrangements, playing a key role in ensuring that arrangements are communicated clearly and accurately. Carry out viewing room duties with empathy for our families and the bereaved Carry out care for the deceased checks as per process and have the skills and knowledge to address presentation as required. Advise families on funeral pricing as per CMA guidelines to ensure an open and transparent approach Advise families on funeral plans as per FCA guidelines and Society process whilst offering great client service Receive and make telephone calls ensuring accurate information is given and received. Complete all administration accurately including the input of information onto the computer. Complete the administration returns required at Central House including the cash statement. Attend training sessions/courses as required and assist with training of new colleagues. Act as a co-operative and supportive team member including ensuring that the Funeral Home (general housekeeping) is kept clean and tidy at all times with correct posters and collateral displayed as per the Funeral Operating Standards. Compliance with Funeral standards of appearance guidelines. Follow local arrangements to ensure the security of the premises and cash including opening and closing of funeral home i.e. alarms, safes kept locked. Assist in promoting Funeral Services within the local community, building up good working relationships with hospitals, nursing homes, local clergy and doctors. Comply with all statutory and Society Health, Safety and Fire Regulations and take action to avoid risk. Cover other Funeral Homes (as required) for sickness and holidays Ensure society policies and procedures are followed at all times. Any other relevant duties as requested 	<ul style="list-style-type: none"> Performance of home(s) Achievement of KPI's – (as per score card and P&L) Growth in market share AAV & Conversions Colleague Engagement Client complaints 	<ul style="list-style-type: none"> Basic numeracy Good telephone manner Basic computer skills Effective communication skills Caring manner and nature