

# Funeral Plan Admin Coordinator

Role Levelling

Business Support U4

Purpose	Key Relationships
<p>The Funeral Plan Admin Coordinator will supervise and monitor SLA compliance for plan administration activities within Finance Shared Services in line with FCA regulation.</p> <p>The role will be responsible for daily leadership of the Plan Admin team including performing their appraisals and one to one reviews. Lead and coach the team to deliver activities in line with standardised procedures that support the Finance Shared Services vision. Ensure controls are embedded to protect the society from Anti Money Laundering and Corporate Criminal Offence risk.</p> <p>The individual must have strong line managerial skills with the ability and experience of leading teams and supporting the continuous improvement of processes.</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>• Finance 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>• Day-to-day management of the Plan Admin team for CEC and CEC FPL, to ensure delivery of a world-class-standard transactional operation.</li><li>• Ensure team activities are aligned to the Finance Shared Services vision and within FCA regulations.</li><li>• Effective communication with key internal and external customers on all matters relating to plan administration.</li><li>• Delivery and prioritisation of all services within resource allocation.</li><li>• Delivery and prioritisation of all functions within SLAs.</li></ul> <p>Main Responsibilities</p> <ul style="list-style-type: none"><li>• Develop, through effective management of allocated resources, a service that meets the agreed SLAs / KPIs and CI for this area of operation</li><li>• Embed a culture of continuous improvement with particular focus on process improvement</li><li>• Ensure the team has an excellent reputation with the CEC and FPL Group</li><li>• Lead, manage and support the teams, providing annual colleague development and performance management plans with regular reviews and talent planning</li><li>• Understand the operating requirements of doing business in an FCA regulated environment</li><li>• Comprehensive reporting of Management Information and Quality Assurance</li><li>• Update and implement new policies when required</li><li>• Day-to-day line management of the team to deliver BAU</li><li>• Manage relationships with internal and external stakeholders; specifically Royal London ensuring that all discrepancies and queries are managed efficiently and resolved in line with service level agreements</li><li>• Act as an escalation point for resolving complex internal and external customer queries</li><li>• Coach and encourage team to identify opportunities for process efficiencies in line with the standardised framework</li></ul>	<ul style="list-style-type: none"><li>• Operation to Perform ways-of-working including visual management, problem solving and coaching</li><li>• Delivery of KPIs, SLAs and personal objectives</li><li>• Performance and development of team</li><li>• Satisfactory performance against quality scores</li></ul>	<ul style="list-style-type: none"><li>• Experience Financial systems</li><li>• Previous Coordinator / Supervisor experience</li><li>• Must be a self-starter and enjoy problem solving</li><li>• Strong understanding of, and experience in, the delivery of a good quality customer experience</li><li>• Strong coaching skills with experience of process improvement methodologies</li><li>• Proven track record of delivering performance against KPIs &amp; SLAs</li><li>• Accuracy and attention to detail</li><li>• Excellent telephone manner, strong interpersonal, facilitation and communication skills</li><li>• Ability to work under pressure to tight deadlines and be resilient</li><li>• Experience of working in a Shared Services environment</li></ul>