

Job profile: Funeral Plan Specialist (Certified)

U3

Purpose: To arrange pre-paid funeral plans for new and existing customers either face-to-face or remotely via video calling or telephone, working in line with agreed processes to ensure positive customer outcomes to support the continued growth of the funeral plan business. Using experience and judgement to operate in line with Financial Conduct Authority regulations as a Certified Individual.

Reporting: Reporting to Funeral Plan Co-Ordinator

Values: Co-operation, Self Help, Self responsibility, Democracy, Equity and Equality.

Essential Skills and experience: Self-motivated and enthusiastic; Excellent listening and communication skills; Good attention to detail; Customer focused; Excellent organisational skills; experience of working in a regulated environment; possible experience in a certified role within an FCA regulated business

Qualifications: Maths & English GCSE pass, or equivalent; experience of using Microsoft Office apps

We are the *difference* makers

NOTE: This is a Certified Role which will require additional Fit & Proper checks. The role cannot be performed until the holder is certified as competent.

We make a difference to Members & customers

Role responsibilities:

- Provide an exceptional customer service to ensure good outcomes for all funeral plan customers and their representatives
- Be responsible for managing activity to ensure compliance with regulatory deadlines and quality SLAs
- Ensure all activity is conducted in line with the relevant regulations, notably FCA regulations on funeral plan sales; PCI regulations on payment processing; Banking regulations on Direct Debit administration
- Understand and act in compliance with the FCA's Conduct Rules, and notify line manager of any issues or breaches which could impact this



Success measures



QA results



Accuracy of all work



SLAs met



PCI compliance maintained

We're better every day

Role responsibilities:

- Understand the team's performance and budgets, taking time to review the various communication updates.
- Have a positive mindset with changes and be open to learn new ways of working.
- Regularly share yours and customers feedback and suggest ways to make the business even better.
- Ensure any customer dissatisfaction is recorded and reported in line with the regulated Complaints process.



Success measures



Engagement survey results



Complaints logged and actioned in line with process

We're a caring community

Role responsibilities:

- Use judgement to recognise vulnerable customers and respond to individual needs, using the agreed processes to support them and record information
- Work together with the team making sure to treat everyone equally.
- Recognise and escalate activities that contravene Anti Money Laundering, Corporate Criminal Risk and Financial Crime policies
- Support funeral homes with local community events and initiatives to maximise opportunities when available



Success measures



Vulnerable customer reports



QA results



Positive colleague / customer feedback

We work together with purpose

Role responsibilities:

- Take responsibility to review Society communications for colleagues and Members and complete the engagement survey to share your feedback on how working here can be even better.
- Complete a minimum of 15 hours CPD each year, in addition to mandatory training modules. Put learnings into practice to train or support others in a similar role.
- Ensure accurate data input to systems, to support MI reporting and compliance monitoring.
- Build relationships with Introducer Appointed Representatives to assist with enquiries around funeral plans



Success measures



Engagement survey participation



Training compliance & recertification



Productivity & absence



Requested reporting is available