

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

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		We're better every day	
Role responsibilities:	✓ Success measures ✓ QA results ✓ Accuracy of all work ✓ SLAs met ✓ PCI compliance maintained	Role responsibilities:	✓ Success measures ✓ Engagement survey results ✓ Complaints logged and actioned in line with process
We're a caring community		We work together with purpose	
Role responsibilities:	✓ Success measures ✓ Vulnerable customer reports ✓ QA results ✓ Positive colleague / customer feedback	Role responsibilities:	✓ Success measures ✓ Engagement survey participation ✓ Training compliance & recertification ✓ Productivity & absence ✓ Requested reporting is available