

Your Co-op Role Profile



Role Title	Funeral Plan Arranger		
Purpose	Proactively building meaningful relationships within the community and clients to ensure they're fully aware of all services the business can offer to support them. As part of a national team, you'll be the first point of contact for funeral plans, delivering a first-class client experience in acting as a subject matter expert, helping both colleagues and clients with funeral plan enquiries and any sales.		
Reports to	Funeral Service Manager	Line Manager of	n/a
Co-op Funeral Plans Limited (Funeral Plan)			
Being there for our clients	<ul style="list-style-type: none"> Responsible for offering plans in line with compliant client journey whether arranged face to face, over the telephone or other digital client journeys plus booking appointments. Planning timely appointments to ensure clients aren't waiting to have a conversation about funeral plans. Being observed with client conversations so that feedback is provided on performance to ensure good customer outcomes are delivered Responsible for the timely capture and input of accurate pre-need information into the relevant systems, ensuring that all client documentation is properly administered. Supporting for the resolution of all client complaints for pre-need where relevant, including any escalations through to the Funeral Service Manager. Following up with clients on previous funeral plan queries (either to yourself or through funeral homes) to see whether it's still a service they require. Proactively seeking opportunities to be visible in the community through forums and talking to potential clients in introducing plans to clients who may need/want one. Supporting vulnerable clients appropriately in line with policies and guidance. 		
Being there for each other	<ul style="list-style-type: none"> Responsible for highlighting any inaccuracy in point of sale and marketing materials with the funeral homes, and ensuring action is taken as a result. Work with colleagues in the Central Care team (CBS) who support with the servicing of plans (for example cancellations, redemptions, mid-term changes and obtaining plan information on redemption) Proactively working with non-certified colleagues in other funeral homes to support them in building awareness of plans to clients. Collaborating as part of a national team to support with queries, appointments and funeral plan sales so that clients no matter where you or they are based have seamless and timely interactions 		
Being there for our Co-op	<ul style="list-style-type: none"> Responsible for reaching and maintaining the required levels of knowledge and understanding for operating in a regulated environment and asking for support where a need is identified. Maintaining 15 hours CPD (Continued Professional Development) and Fitness and Propriety checks. Inputting all client interactions on the system so we have full visibility of the client journey, to follow up on in the future and understand how we can enhance the client experience. Proactively analysing funeral plan referrals from branches to understand and act on opportunities to drive improvement. Adherence to regulatory policies and processes in respect of plan sales. 		

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Funeral Services Limited (At-Need)	
Being there for our clients	<ul style="list-style-type: none"> • May be required at times to support branch availability. Therefore, on these occasions will be responsible for ensuring the funeral home, both internally and externally, is safe, clean and tidy. Ensuring all H&S checks are fully completed and reporting any maintenance issues to the facilities helpdesk in a timely manner. • If having the above responsibility, you'll need to manage any client interactions when required at the branch for At Need activities i.e. by referring or confirming an appointment at a different time to ensure client satisfaction.
Empowered to	<ul style="list-style-type: none"> • Holding a certified position in the Co-op Funeral Plans Limited (CFPL) business, which involves a requirement of an annual Fitness and Propriety assessment. • Create own personal development plan and continuous professional development interventions • Client interactions are observed and feedback on performance. • Delivering excellent service through <u>every</u> client interaction. • Being mobile to work in different locations to meet the needs of clients and FNC • Guaranteeing a client will always leave an interaction with you feeling their query or concern has been compassionately and expertly dealt with and fully aware of the next steps in their journey. • Keeping up to date with our legal propositions and identifying opportunities to support clients by referring legal services. • As part of the Conduct Rules populations, you will comply with FCA regulations in all interactions with CFPL clients, adhering to the Individual Conduct Rules <ul style="list-style-type: none"> ○ You must act with integrity ○ You must act with due care, skill, and diligence. ○ You must be open and co-operative with the FCA, the PRA and other regulators. ○ You must pay due regard to the interests of clients and treat them fairly. ○ You must observe proper standards of market and conduct. ○ You must act to deliver good outcomes for retail customers.
Skills, Knowledge & Experience	<ul style="list-style-type: none"> • This will be a certified position within the business and therefore an annual Fitness and Propriety assessment will be required with maintaining 15 hours CPD (Continued Professional Development) • Adaptability in operating within a national team. • Critical to building client rapport and consistent experience to enable funeral plan sales • Complying with processes, use of systems and technology to enhance client journey. • Utilising all available technology, when required. • Required to adhere to process and policies within a regulated environment. • Providing service industry experience. • Having attention to detail – accuracy. • Acting with discretion. • Having excellent communication skills. • Being a team player, building and maintaining professional relationships • Inclusion and Belonging, Growth mindset, Speaking up, collaboration.

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Success Measures

- We ensure all clients have access to all products and services, and able to choose the personal options that meet their needs.
- We adhere to our commercial processes; they're second nature to us because we know they're central to our success.
- We create a welcoming and inclusive environment in our branches that facilitates the best client outcomes and experience.
- We collaborate nationally to maximise client experience
- We create an inclusive work environment where everyone feels safe and well equipped to do their best work.
- Care for our clients goes beyond the funeral. We champion all relevant Co-op Life Services products and services, and the value these provide to our clients to exceed their expectations and in doing so generate recommendations for future business.
- We recognise and compassionately deal with customer dissatisfaction.
- We use all available technology to enhance client experience.
- We encourage a cost-conscious culture
- New recruits feel welcomed and supported on joining and understand the part they play in Funeralcare and the Co-op.
- We continually develop our colleagues in a personal and empathetic way to best meet the needs of our clients.
- Our colleagues understand and are engaged in key business activities and priorities.
- We all create a work environment where our colleagues feel appreciated and recognised for their impact on delivering the Funeralcare strategy.
- We actively get involved with the community to promote our brand and services for the long-term sustainability of our Co-op.
- We help and encourage our clients to engage with and maximise the best value from our Co-op Membership proposition.
- We ensure that regulatory processes are adhered to regarding funeral plans and comply with quality assurance checks and feedback and in doing so keep our clients protected.
- We make Funeralcare a great place to work by taking a zero-tolerance approach to bullying & harassment and demonstrate the Co-op ways of being in everything we do.