

Your Co-op Role Profile



Role Title	FSM – Client Enablement & Performance	Work Level	6a
Working pattern	37.5 hours Availability 8am-8pm aligned to team working patterns Occasional weekend working		
Purpose	<p>As the FSM – First Contact, you will lead a team of colleagues who represent the very first voice of Co-op Funeralcare — including our Funeral Plan Arrangers (FPAs) and First Contact & Retention Advisers. This team plays a vital role in shaping the first impression for every potential client, where every conversation is an opportunity to win trust, build connection, and provide guidance and support to a family as they navigate a difficult moment in life.</p> <p>You'll be responsible for creating a culture of excellence, where colleagues deliver compassionate, confident, and commercially aware client interactions. Through coaching, development, and insight-led performance conversations, you'll ensure your team is equipped to respond with empathy, precision, and professionalism. Helping clients feel supported from the very first contact, whilst ensuring we remain compliant throughout processes and meet regulatory requirements.</p> <p>This role is about achieving consistently high standards, developing capability, and continuously improving how we connect with clients — ensuring no opportunity is missed and every interaction reflects our values and ambition to grow fulfilling our purpose of helping everyone to say their best goodbye.</p>		
Reports to	Head of First Contact & Client Retention	Line Manager of	15
Contribution	<p>At Need & Pre-need</p> <p>Leadership & Team Development</p> <ul style="list-style-type: none"> Lead, coach, and inspire a team of FPAs and First Contact Advisers to deliver outstanding client contact, acquisition & retention. Create a culture focused on compassion, confident knowledge, and consistency, compliance & continuous improvement. Support wellbeing and development through regular 1:1s, coaching, and team engagement. <p>Client Experience & Engagement</p> <ul style="list-style-type: none"> Ensure every first contact is a meaningful opportunity to build trust and win the funeral. Monitor, observe and improve the quality of client interactions through call listening and feedback. Champion a client-first mindset across the team, ensuring empathy and professionalism in every conversation. Provide ad hoc support to the First Contact Advisor, including handling initial calls and inquiries during periods of absence or high demand. 		

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Insight, Continuous Improvement & Outcome Focus

- Use data and insight to identify trends, opportunities, and areas for improvement, ensuring decisions are both client-centric and commercially sound.
- Collaborate with colleagues to refine checklists, tools, and processes that enhance the client journey through knowledgeable, consistent interaction.
- Support the development of a culture that values learning, feedback, and opportunity, while remaining focused on delivering measurable outcomes and meaningful results.
- Balance a strong results orientation with empathy and integrity, recognising the importance of doing the right thing in a financially regulated environment.

Operational Excellence & Compliance

- Ensure compliance with regulatory requirements and internal policies, particularly in relation to funeral plan conversations.
- Maintain accurate records and ensure all client interactions are logged and followed up appropriately.
- Support onboarding, training, and certification of colleagues in line with FCA and Co-op standards.

Funeral Services Limited (At-Need)

- Build a strong and effective relationship with the Regional Manager, other Funeral Service Managers, and Care Logistics Managers to ensure high standards of client service and effective colleague collaboration.
- Review management information from multiple sources to focus on key areas of improvement and process adherence.
- Responsible for meeting financial objectives, reviewing relevant data, and taking action to drive performance.
- Ensure full understanding of both change and BAU activities to act as a change advocate and coordinate change initiatives.
- Conduct observations, 1:1s, team briefings, and development conversations to support colleague progression and performance improvement.
- Maintain commercial awareness of competitors to inform planning and mitigate market share impact.
- Build internal and external networks, nurture relationships, and represent the business in community organisations.
- Schedule colleagues to ensure payroll aligns with budget and resolve MyTime issues to ensure accurate and timely pay.
- Role model inclusive leadership, promoting a culture of collaboration, coaching, learning, growth, and continuous improvement.

Pre-Need

Co-op Funeral Plans Limited (Pre-Need)

- Holds a Certified position in the business.
- Responsible for ensuring certified colleagues reach and maintain required competency levels for operating in a regulated environment, and provide retraining where needed.
- Responsible for accuracy of point-of-sale and marketing materials in funeral homes, ensuring all information is current and compliant with regulatory policies and processes.

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	<ul style="list-style-type: none"> Responsible for the resolution of all client complaints, including escalations to the Chief Operating Officer. Establish and maintain professional relationships with local care homes by supporting them in the provision and promotion of funeral plans in their premises.
Behaviours	<p>Leadership behaviours:</p> <p>Specific to Co-op Funeral Plans Limited (Pre Need):</p> <p>Tier one: Individual Conduct Rules.</p> <ol style="list-style-type: none"> You must act with integrity. You must act with due care, skill and diligence. You must be open and cooperative 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 conduct You must act to deliver good outcomes for retail customers Funeral Services Limited <p>(At-Need)</p> <p>Able to create an inclusive climate of service excellence and client care, where colleagues feel supported in their development and confident and safe to share ideas, and to speak up where poor or unacceptable behaviour is observed or experienced.</p> <p>Behaviours:</p> <ul style="list-style-type: none"> This role should be an Expert in Inspirational Communication, and Developing Others, and Good at Forging Relationships, Successful Transformation and Endless Inclusion. Purposeful Leadership: motivate and inspire team members to excel in their roles and contribute to the Life Services and Coop Vision through thinking member owner. Doing right by people - passionate about helping others grow and succeed, through open and honest communication. Outcome focused, proactive, solutions-focused, able to work autonomously. True Cooperation: a belief in cooperation & collaborative ways of working, able to build strong relationships and work in partnership, to achieve shared goals and objectives. Comfortable navigating ambiguity and driving change. A strong sense of integrity and commitment to doing the right thing for colleague & clients. Demonstrates a commitment to personal development, role modelling adaptability and a proactive approach to supporting new and evolving responsibilities as the team grows.
Empowered to	<p>Key responsibilities include:</p> <ul style="list-style-type: none"> Coach and develop own team Challenge the behaviour of own teams and other colleagues Create own personal development plan and continuous professional development interventions

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	<ul style="list-style-type: none"> Decide when to advertise for vacancies, and select the best candidate from those shortlisted by the Resourcing team Schedule colleagues in a fair and cost effective way Decide on actions relating to the outcome of MI provided Suggest PR and marketing responses in relation to external factors, such as competitors or client complaints
Capabilities	<p>This is a certified role, requiring an annual Fitness and Propriety assessment, calls for a Commercially focused, results-driven leader who can build momentum, lead change, and deliver impact through others. The ideal candidate will demonstrate:</p> <ul style="list-style-type: none"> Ability to implement plans and lead teams through change, delivering results at pace in client-focused or regulated environments. Strong coaching and development skills, building confidence and capability through clear, constructive feedback. Excellent communication and influencing skills, with the ability to build trust and manage internal and external stakeholder relationships. Commercial acumen and operational experience, ideally within Funeralcare or a comparable environment, with a focus on client outcomes. Data-driven decision-making, using insight to identify opportunities and drive continuous improvement. Resilience, empathy, and adaptability, with a commitment to wellbeing and supporting meaningful conversations around mental and physical health. Tech confidence and agility, comfortable navigating systems and supporting teams through transformation.
Work Level Descriptor	<p>Accountability Impact Co-operation</p>