

## JOB DESCRIPTION

**JOB TITLE:** Choice Pre-Need Executive

**LEVEL:**

**REPORTS TO:** Pre-Need Office Manager

**Job Purpose:** As a Pre-Need Executive your task will be to support the sales of funeral plans within Funeral Partners branch network of 279 funeral homes nationwide, through affinity channels and on-line. Provide expert advice to the employees of Funeral Partners on funeral plans, dealing daily with customers enquiries. Work within the funeral planning team providing administrative support and assisting with training and the roll-out of new initiatives.

### MAIN DUTIES:

- Assist in the daily office requirements i.e. answering telephone calls, processing payments, compiling spreadsheets and filing
- Write and distribute email, correspondence memos, letters and forms and assist in the preparation of scheduled reporting
- Handle administrative requests and enquiries from branch employees, clients and third party affiliates
- Provide support to the Office Manager and any other duties as requested by Management
- Ensure accurate recording of all plan sales and complete administration tasks to plan provider (Ecclesiastical)
- Ensure accurate recording of all Redemptions i.e. Choice and all third party plan providers to branches. Assisting with employee training where required to ensure best practice across the business
- Produce weekly KPI reports regarding allocated tasks to senior line management
- Collate and monitor branch stationery orders, challenge high volume orders. Ensure completion of Events calendar.
- Obtain quotes for all orders of reprints and promotional goods, any anomalies must be investigated and obtain management approval before ordering. All orders to be tracked on order log and added with corresponding invoice to the budget
- Ensure Choice spend is accurately captured in the budget spreadsheet, paper files must match spreadsheet for auditing and reference purposes. Summary of YTD spend included in Weekly/Monthly reports to senior line management
- Provide quality client service, interact with clients and effectively handle client queries and complaints
- Supporting your colleagues as required and understanding other roles within the office
- To promote the Company ensuring all employees offer our full range of services including funeral pre-need plans and memorials
- To ensure your own personal hygiene and state of dress falls within the company's policy and that, where provided, uniform is worn
- To comply with the Company's policies and procedures on health, safety and hygiene and report all infringements where identified
- To be fully committed to the Employee Charter, the visions, values and standards of FPL and to lead by example
- To attend training sessions as and when required for your development
- To act as an ambassador for the company at all times

### KNOWLEDGE AND SKILLS

#### Essential:

- Customer-focused, result-oriented person with a can-do attitude
- Excellent communications skills, both oral and written, with an ability to create and Deliver
- Experienced and competent in all aspects of administration
- Excellent telephone skills
- Experience in working within fast-paced. environment with an ability to work under pressure
- Strong numeracy and literacy skills
- Strong reasoning and negotiating ability.
- Computer literate, including Word and Excel.
- Able to manage stressful situations.
- Demonstrate a willingness to be involved in all aspects of the Company as required.

#### Personal Attributes;

- Customer-focused, result-oriented person with a can-do attitude
- Organised, able to multi-task and manage own workload.
- Understand teamwork, able to demonstrate a good team player but with the ability to

- Ensure that services including funeral pre-need plans and memorials are offered to clients in line with the applicable regulations and guidelines (please see below)

- also work well alone.
- Willing to be flexible and adaptable to the needs of the organisation.
- Outgoing and communicative
- Understand teamwork, able to demonstrate a good team player but with the ability to also work well alone.
- Demonstrate a calm and efficient demeanour.

## Financial Conduct Authority (“FCA”) Compliance

This role will be responsible for offering Funeral Pre-Need plans to clients, however the individual role holder must only perform this part of the role if they comply with all items in the below list.

The individual role holder will:

- Not discuss funeral plans with customers until they have been trained and passed an Initial Assessment
- Attend the required training courses in order to become competent as a plan seller, and will form part of the overall Competency Framework associated with funeral plans
- Take ownership for their Continued Professional Development (“CPD”) throughout the year in order to align with FCA requirements and attend ad hoc learning activities provided by the business
- At all times, act in accordance with the [FCA’s Conduct Rules](#).
- After being trained, understand and comply with the [FCA’s 11 Principles for business](#)
- Support individual customers in accordance with the [FCA’s consumer principle and cross-cutting rules](#).
- Deliver the outcomes required from the [FCA’s consumer duty](#).
- Take into consideration the needs of vulnerable customers and particularly vulnerable customers and take specific action to support these customers, as appropriate

## OUR COMPANY VALUES AND HOW I LIVE THEM

<p><b>HELPING PEOPLE</b></p> <p>Our business exists to help the bereaved to make fitting arrangements for their loved one's last journey and to provide lasting memories for families and friends. We do this with a positive, caring and understanding approach.</p>	<p>I act as an ambassador for the company by being responsive to the client's needs and responding promptly to client requests.</p> <p>I actively seek to support others as well as asking for help from a manager or colleagues when needed. I proactively engage with the immediate and wider team.</p> <p>I act as role models in all I do and say.</p> <p>I support colleagues in delivering their goals, I am flexible to meet short term and unexpected business needs. I proactively volunteer to assist in a time of crisis.</p> <p>I seek to understand the client's needs through probing questions and active listening</p> <p>I share knowledge and experience freely. I offer and accept constructive feedback.</p>
<p><b>RESPECT FOR EVERYONE</b></p> <p>We value diversity and treat everyone with the same respect, courtesy and dignity.</p>	<p>I communicate effectively, actively listen and question appropriately.</p> <p>I respect the confidence of the clients and colleagues at all times</p> <p>I can be relied on to be present and actively engaged in my work</p> <p>I recognise and respect difference and diversity in our clients and colleagues alike.</p> <p>I draw attention to inappropriate actions or behaviours within my immediate or wider team.</p> <p>I seek to review all available information before making a decision and I willingly provide explanations and reasons to support my actions.</p>
<p><b>PROFESSIONAL STANDARDS</b></p> <p>We are a professional organisation and we strive to achieve the highest possible standards in everything we do and to improve these standards continuously.</p>	<p>I take pride in my appearance and adhere to our company dress code.</p> <p>I implement ideas to improve the processes and performance within the scope of my operation. I escalate suggestions outside my scope to my immediate manager.</p> <p>I provide constructive challenge and ideas to continually improve our processes and performance.</p> <p>I adhere to our policies, standards and processes at all times. I ask for clarification when needed.</p> <p>I have an active interest in the business and understand the contribution I make through my work.</p> <p>I think and act innovatively to improve value for both the clients and company.</p>
<p><b>ACCEPTS RESPONSIBILITY</b></p> <p>We accept responsibility for our actions as a company and as individuals.</p>	<p>I demonstrate awareness of the impact of my own behaviour and how I use this appropriately with clients and colleagues.</p> <p>I take personal responsibility to ensure that client's needs come first and that the company values are maintained at all times</p> <p>I take personal ownership for resolution of issues, escalating those that cannot be resolved personally or promptly.</p> <p>I know my own strengths and areas of development and I take responsibility for my own learning. I act on feedback to improve my own performance and impact.</p> <p>I don't walk past a problem no matter how large or small.</p> <p>I ensure that my work is delivered to a high standard, and I constantly aspire to improve the quality and value of our products and services.</p>
<p><b>PARTNERSHIP</b></p> <p>We believe that we can only achieve our goals by working together in partnership with client families, suppliers and our employees.</p>	<p>I work effectively and collaboratively with others as a part of a team.</p> <p>I seek to learn from others in order to continuously develop.</p> <p>I successfully resolve issues in a way that maintains and builds a positive long-term relationship; I influence others using a win-win approach.</p> <p>I bring ideas to the team and remain open to change.</p> <p>I develop a positive working relationship with clients, my team and external influencers.</p> <p>I actively seek the views of others. I listen and talk to people to improve the way I do things.</p>