JOB DESCRIPTION

| **Title** | Arrangement Counsellor/Funeral Director Assistant |
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| **Reports To** | Funeral Services Manager |

**Job Purpose**

The Arrangement Counsellor/Funeral Director Assistant for [Organization Name] is a professional sales position who will meet and consult with at-need or pre-need client families to determine needs and then to offer, negotiate, and prepare sales contracts for cemetery, cremation, and/or pre-need funeral supplies and services, subject to licensing limitations.

They complete other related tasks including, but not limited to, taking on new inquiries from new or existing client families; prospecting new or existing clients for new sales opportunities; managing new and existing client families accounts; and ensuring that documentation is completed, processed and filed as required.

The position also includes Funeral Director Assistant duties. The incumbent will assist and support the funeral components of [Organization Name] including but not limited to the removal and transfer of a decedent from a residential or institutional setting; funeral preparations and services as needed under the direction and/or supervision of the Funeral Director.

The Arrangement Counsellor/Funeral Director Assistant shall serve at all times the clients of the company with a high degree of professionalism and tactfulness that is expected of the community we serve, our established expectations, and the commonly accepted expectations set forth by the bereavement sector regulators.

**Duties and Responsibilities**

Key responsibilities include, but are not limited to the following:

* Market, consult, offer, negotiate and/or sell cemetery and crematorium supplies and services (interment rights, markers, interment services, cemetery supplies and services, cremations, etc.) as well as pre-need funeral arrangements, as permitted by licensing, to at-need and pre-need clients through appointments and meetings;
* Consult and review with client families to verify family information and lead dialogue to uncover client needs, wishes and/or preferences in order to prepare arrangements, packages or options and to meet those needs (at need or pre need) by building rapport and using approved and ethical professional selling techniques;
* Follow up with families and relatives to uncover additional sales opportunities;
* Respond to client issues and offer solutions, or information in a timely fashion;
* Effectively arrange, coordinate and communicate services for at-need clients to ensure needs are met in a timely and organized manner by acting as liaison with internal and external sources including but not limited to: funeral directors, funeral homes, transfer services, crematoriums, administration department, grounds & horticulture department, estate trustees/executors, next of kin, government agencies, interment rights holders, suppliers, third party service/product providers, etc.;
* Consult with management regarding extraordinary or irregular client issues including but not limited to errors, difficult clients, refunds, burial/disisterment requests, complaints, etc.
* Initiate documentation and follow upon on work orders or service orders to ensure timely and accurate delivery of such services and that they are delivered to client expectations and to the standards set by the Company;
* Ensure contracts, documents and records are completed, processed and fulfilled in an accurate and timely manner;
* Perform searches that may include genealogical records, indexes, maps and site surveys to support sales or customer service efforts;
* Note, record and report any discrepancies with information or other issues that are uncovered or come to light;
* Communicate with suppliers for the order and delivery of items such as urns, monuments, markers vaults and memorialization as required;
* Represent the company as needed at events, functions, and at funeral and/or interment services as well as oversee assigned graveside services;
* Keep current and aware of emerging trends in the bereavement sector as well as sales and marketing trends, by way of independent learning, industry related courses and education seminars;
* Track, manage and be accountable for own sales, tasks and client follow ups;
* Assist, as needed, with the removal and/or transfer of a decedent from place of death (private residence or institution or other facilities) to our facility at any time of day or night, including weekends and statutory/company holidays;
* Assist, as needed, under the direction or supervision of a Funeral Director, with the preparations of the decedent for cremation or casket interment;
* Assist, as needed, with any onsite or off sight funeral services or receptions;
* Assist, as needed, with the preparation and execution of funeral arrangements or aftercare, including the filing of documentation under the direction or supervision of a Funeral Director;
* Take first calls or inquiries, as needed, during or after hours regarding funeral, cremation or cemetery arrangements;
* Maintain personal work space as well as other common areas such as bathroom(s), hall ways, doors, entrances, kitchenette, and others areas or items (vehicles, department equipment, laundry, holding room) as required and/or directed. Includes but not limited to disinfecting, cleaning surfaces (doors, wall, windows), vacuuming, sweeping, mopping, dusting, cleaning dishes, removing garbage, sanding and salting outside entrances etc.);
* Complete periodic reporting as required and/or requested by the management team;
* Contribute to the development and implementation of new sales or marketing initiations as well as procedures or processes as requested by management;
* Comply with all pertinent legislation and associated regulations, internal bylaws, internal policies, and safety laws and regulations; and
* Perform other related duties as required.

 **Qualifications**

* High School Diploma, General Education Diploma (GED) required
* Post-secondary Certificate in Business, Sociology, Psychology or a related discipline is preferred.
* Minimum XX years experience working in a confidential client service atmosphere is essential; the funeral services sector is preferred.
* Previous experience in sales or customer service driven is highly preferred.
* Proficiency in using office equipment, e.g., telephone, fax, printer, calculator, photocopier, and digital camera.
* Proficient in the use of computers, including Microsoft Office Suite and the Internet.
* Previous experience with Customer Relationship Management systems is a plus.
* Employment with the Company is conditional to acquiring and holding provincially issued Sales Representative License and Funeral Pre-Planner License.

 **Core Competencies**

* Excellent verbal and written communication skills to communicate effectively with internal and external stakeholders.
* Ability to work independently and as part of a team.
* Excellent time management and organizational skills.
* Ability to read people (situationally, emotionally and body language) while demonstrating tactfulness, empathy and maintaining professionalism and composure.
* Ability to deliver high levels of customer service under stressful circumstances.
* Excellent attention to detail and a high degree of accuracy in all tasks.
* Ability to adapt to change, to multi-task, to quickly re-focus, and to prioritize work.
* Ability to respect privileged company and client information.

 **Working Conditions**

* The standard work week for this position is [insert #] hours.
* The standard business hours for this position are [insert core hours].
* Overtime and hours worked outside of the standard work schedule are required, including some days, evenings, nights, weekends and holidays as needed.
* On-call requirement for emergencies.
* May require traversing short distances over uneven ground and remaining in place for extended periods of time.
* May require facing screens, and using phones, keyboard and mouse for extended periods of time.
* Tasks will include lifting decedents on to stretcher and transporting loaded stretches from different levels, steps, elevators, over uneven ground, etc., up to a maximum of (XX) pounds.
* Exposure to fetid odours and bodily fluids.
* May involve exposure to all types of weather conditions when attending outdoors services.