

# Employer Occupational Brief

A guide to apprenticeship training and on-programme  
assessment

**Funeral Team Member**

**February 2019**

## Overview of the job role

Funeral team members are the first point of contact for the business so must create a good first impression, put clients at ease, take information, answer questions or find answers, building good client relationships and confidence while upholding the image of the business.

Funeral team members make a positive difference to their clients at a challenging, emotional time and contact with the deceased is a key aspect of any role within this industry. Working with people, feeling passionate about supporting and assisting clients is a rewarding and worthwhile job that provides excellent career opportunities.

Funeral team members will specialise in one of two roles:

**A Funeral Arranger** – Supports the funeral director by arranging funerals and pre-payment plans, handling customer enquiries, sales and after care either on or off site. Administration and payment reconciliation is a part of this job role.

**A Funeral Operative** – Plays an active role in assisting the funeral director on funerals, cleaning and driving a variety of vehicles, bringing the deceased into care, preparing the deceased and coffins and supporting client visits. Operatives will participate in an out-of-hours service.

This employer occupational brief is designed to bring context and expand upon the standard to assist employers and education and training providers to develop the 'on-programme' elements of an apprenticeship. It should be read in conjunction with the assessment plan to ensure full coverage of the requirements is incorporated into the learning and development phase. The statements below are designed to guide and provide examples in a general environment, additional contextualisation will often be necessary to ensure brand / organisational standards are being met.

**The detail behind the standard:**

	<b>Knowledge and Understanding (Know it)</b>	<b>Skills (Show it)</b>	<b>Behaviours (Live it)</b>
<b>Client</b>	<p><b>How to communicate with clients during the various stages of the grieving process.</b></p> <ul style="list-style-type: none"> <li>• Understand the different stages of grief, how to adapt your communication style to suit these stages</li> <li>• Understand the impact the choice of communication makes</li> </ul> <p><b>Specific client communication needs, for example, dementia, language, cultural diversity.</b></p> <ul style="list-style-type: none"> <li>• Understand the specific individual needs of the client regarding communication</li> <li>• Know who to seek help from in the organisation</li> <li>• Understand the impact that this communication has on the client</li> </ul>	<p><b>Use appropriate methods of communication including non- verbal, verbal, written and social media.</b></p> <ul style="list-style-type: none"> <li>• Use each method to suit the client’s needs adapting style when appropriate</li> </ul> <p><b>Use clear language in all communication, verbal and written, seeking help when it is required.</b></p> <ul style="list-style-type: none"> <li>• Correct use of template and online forms</li> <li>• Seek help from appropriate colleagues to ensure appropriate language is used</li> </ul>	<p><b>Confidently interact with clients adapting to the needs of the individual during the grieving process.</b></p> <ul style="list-style-type: none"> <li>• Takes cues from the client and adapts/mirrors style to suit individual clients</li> </ul> <p><b>Communicate politely at all times.</b></p> <p><b>Show respect when communicating with all clients and third parties.</b></p> <ul style="list-style-type: none"> <li>• Demonstrates care and compassion offering support where necessary</li> </ul>
	<p><b>Client types, how to identify their needs and preferred methods of communication.</b></p> <ul style="list-style-type: none"> <li>• Know the different client types (pre-need, at-need, post-need)</li> <li>• Know which communication style would suit – pre-need = sales transaction, act-need = emotional / handling grieving client, post-need = emotional / grieving but further along the grief process</li> <li>• The importance of being able to recognise the client’s needs and adapting approach to suit</li> </ul>	<p><b>Use clear, relevant and empathetic communication to establish clients’ needs and satisfy their requirements.</b></p> <ul style="list-style-type: none"> <li>• Demonstrating good listening skills</li> <li>• Asking appropriate questions at the correct time</li> <li>• Reacting to cues given by the client</li> </ul> <p><b>Deliver excellent service during all interactions, including phone, face-to-face, electronic and postal communications.</b></p> <ul style="list-style-type: none"> <li>• Keeps in regular contact with the client, ensuring client is informed at all stages</li> </ul>	<p><b>Communicate clearly and with empathy at all times.</b></p> <ul style="list-style-type: none"> <li>• Communicates at all times with respect, care and compassion</li> <li>• Clear communication with the client to check understanding at each stage of the process</li> <li>• Demonstrates empathy when communicating with clients</li> </ul>

	Knowledge and Understanding (Know it)	Skills (Show it)	Behaviours (Live it)
	<p><b>The importance of meeting client's needs and requests, whilst working in line with the products and services offered by the business.</b></p> <ul style="list-style-type: none"> <li>Understanding the full range of products and services offered by the organisation and the importance of asking questions to establish the client's need</li> </ul>	<ul style="list-style-type: none"> <li>Offering support to assist the client with a full range of product choices</li> <li>Pre-empting the client's needs to ensure the process runs smoothly</li> </ul>	
	<p><b>How to obtain and handle client feedback both positive and negative, the information required from clients to resolve an issue and when to ask for help.</b></p> <ul style="list-style-type: none"> <li>Methods to obtain feedback – where applicable through customer questionnaire, follow-up phone calls, client thank you cards, letters/emails of complaint</li> <li>Understanding the complaints process, contributing to investigations, knowing who and when to escalate problems to</li> <li>Understand the importance of sharing positive feedback with the wider team</li> </ul>	<p><b>Apply business policies and procedures to handle client concerns, complaints and compliments.</b></p> <ul style="list-style-type: none"> <li>Following the business to procedure to ensure that all comments and concerns are addressed appropriately</li> </ul> <p><b>Deal with client feedback within the limits of your own authority, sharing positive comments, escalating negative comments and finding solutions where possible.</b></p>	<p><b>Professionally and calmly, work with clients to resolve concerns, complaints and use compliments effectively in the funeral business.</b></p> <ul style="list-style-type: none"> <li>Puts feedback into action to support the business</li> </ul>
<b>Reputation</b>	<p><b>How to protect the business reputation based on values, vision, aims and behaviours.</b></p> <ul style="list-style-type: none"> <li>Know the business values, vision, aims and behaviours and how these may be demonstrated</li> </ul> <p><b>The importance of maintaining a good reputation with clients, competitors and within the local area.</b></p>	<p><b>Operate within the business values when dealing with clients and team members in all daily activities.</b></p> <ul style="list-style-type: none"> <li>Demonstrates a working knowledge of the business vision, values, aims and behaviours</li> <li>Leads by example to be a role-model for the business</li> </ul>	<p><b>Support the reputation of the business by providing a professional service to clients, knowledgeable of how it compares to competitors.</b></p> <ul style="list-style-type: none"> <li>Demonstrates knowledge of competitors and articulates this to clients while providing a professional service</li> </ul>

Knowledge and Understanding (Know it)	Skills (Show it)	Behaviours (Live it)
<ul style="list-style-type: none"> <li>• Understand the ways that the business reputation may be impacted by these</li> <li>• Understand the importance of good relationships with key stakeholders within the community</li> <li>• Know who your competitors are</li> </ul>		
<p><b>Client types and the local community demographic.</b></p> <ul style="list-style-type: none"> <li>• Understand the different types of clients and the makeup of the community in which you operate in relation to age, ethnicity and religious requirements</li> </ul> <p><b>The benefit to yourself and the business of forming professional relationships.</b></p> <ul style="list-style-type: none"> <li>• Understanding the advantages of being business of choice in the area</li> </ul> <p><b>The acceptable boundaries of professional relationships.</b></p> <ul style="list-style-type: none"> <li>• Know the differences between personal and professional relationships</li> <li>• Understand how professional relationships can support client's when purchasing pre-need, at-need and post-need products and services</li> </ul>	<p><b>Engage in professional relationships with clients, communities and other stakeholders in order to help build a positive public reputation.</b></p> <ul style="list-style-type: none"> <li>• Demonstrates involvement with the local community (Remembrance Sunday, local coffee mornings)</li> <li>• Operates professionally when representing the business</li> </ul> <p><b>Report any instance where the reputation of the business could be / has been damaged.</b></p> <ul style="list-style-type: none"> <li>• Support the business processes and procedures to ensure that the business reputation is maintained at all times</li> </ul>	<p><b>Treat all clients and colleagues with respect and work positively within the local community.</b></p>

	Knowledge and Understanding (Know it)	Skills (Show it)	Behaviours (Live it)
	<p><b>How technology, including social media is used in the business and how it contributes to the business reputation.</b></p> <ul style="list-style-type: none"> <li>Know and understand the business policy regarding social media use, email etiquette</li> <li>Understand the impact of non-compliance to this</li> </ul>	<p><b>Use technology including social media in line with business requirements.</b></p> <ul style="list-style-type: none"> <li>Demonstrates adherence to the social media policy and guidelines for email use</li> <li>Considers the impact of personal actions against business reputation</li> </ul>	<p><b>Actively promote the reputation of the business by using social media and business technology tools responsibly.</b></p> <ul style="list-style-type: none"> <li>Being involved in the community via social media, contributing to community forums and discussions</li> <li>Using an online presence actively and responsibly promote the business</li> </ul>
Team	<p><b>How to support and influence the team positively, recognising how all colleagues and teams are dependent on each other to meet business objectives.</b></p> <ul style="list-style-type: none"> <li>Understand the ways to support the team – for example suggesting ideas, sharing concerns, working to achieve a common goal</li> </ul>	<p><b>Support team members to ensure that the services provided are of a high quality, delivered on time and as required.</b></p> <ul style="list-style-type: none"> <li>Attend team briefings to ensure common aims are understood</li> <li>Communicates clearly and supports colleagues as necessary</li> <li>Asks questions to ensure understanding</li> </ul>	<p><b>Be conscious of the impact of personal behaviours on the team by a consistent, positive and professional approach.</b></p> <ul style="list-style-type: none"> <li>Demonstrates self-awareness and the need for a positive, professional approach</li> </ul>
	<p><b>Different types of teams, third party team members and stakeholders within the wider team and how strengths and weaknesses affect team dynamics.</b></p> <ul style="list-style-type: none"> <li>Different team operations – teams may be made up differently (permanent / casual / flexible team members)</li> <li>Third party team – celebrants, embalmers, cremation / cemetery staff, specialist service providers</li> <li>Understand team dynamics, relations</li> </ul>	<p><b>Adapt positively to all types of team leaders, team members and different types of team within the business in which you work.</b></p> <ul style="list-style-type: none"> <li>Listening to team leaders and colleagues, adapting activities to suit the need of the specific team</li> </ul>	<p><b>Consistently exhibit respect and work positively with team leaders and team.</b></p> <ul style="list-style-type: none"> <li>Actively participating in activities, acting as a role model to others</li> </ul>

	Knowledge and Understanding (Know it)	Skills (Show it)	Behaviours (Live it)
	<ul style="list-style-type: none"> <li>• between team members</li> <li>• Understand leadership styles</li> <li>• Understand how to deal with potential conflict between colleagues and team</li> <li>• Understand how to recognise strengths and weaknesses and use this to provide excellent service</li> </ul>		
<b>Legal and Governance</b>	<p><b>The legislative requirements, duties and responsibilities of the business.</b></p> <ul style="list-style-type: none"> <li>• Legislation - Health &amp; Safety, Data Protection, Manual Handling, COSHH, RIDDOR</li> <li>• Regulation/policies - handling of donations, financial crimes, security procedures</li> </ul> <p><b>The policies and procedures of the business regarding the deceased when they are in own premises or third party locations, identification, release of ashes, personal effects, notifiable diseases and specialist services.</b></p>	<p><b>Comply with legal and business requirements whilst conducting all services.</b></p> <p><b>Follow business policies and procedures relating to third party locations of the deceased, identification, release of ashes, personal effects, notifiable diseases and specialist-services.</b></p> <ul style="list-style-type: none"> <li>• Demonstrates understanding of legal / business requirements</li> <li>• Follows all policies and procedures identified</li> </ul>	<p><b>Operate in an honest and trustworthy way demonstrating integrity in all duties respecting the dignity of the deceased at all times.</b></p>
<b>Personal Development and performance</b>	<p><b>How personal development and performance contributes to success of the business.</b></p> <ul style="list-style-type: none"> <li>• By updating knowledge regarding products, services, business events, change to policies/procedures etc.</li> </ul>	<p><b>Take ownership for own learning development and performance.</b></p> <ul style="list-style-type: none"> <li>• Demonstrate commitment to self-development and improving performance</li> </ul> <p><b>Carry out personal development activities</b></p>	<p><b>Reflect on own ways of working and with support from your line manager, actively create and implement a personal development plan.</b></p>

	Knowledge and Understanding (Know it)	Skills (Show it)	Behaviours (Live it)
	<p><b>How to identify personal goals and development opportunities and the support / resources available to achieve these.</b></p> <ul style="list-style-type: none"> <li>• Performance reviews, 1:1 conversations with managers / colleagues, feedback, continuous improvement</li> <li>• Reading trade journals, attending conferences, being aware of industry trends</li> </ul> <p><b>Different learning styles.</b></p> <ul style="list-style-type: none"> <li>• Understand different learning styles – auditory, kinaesthetic and visual for example</li> </ul>	<ul style="list-style-type: none"> <li>• Complete development activities identified and within time constraints.</li> </ul> <p><b>Identify your own learning styles.</b></p> <ul style="list-style-type: none"> <li>• Identify your preferred learning style for different activities</li> </ul>	
<b>Products and services</b>	<p><b>The full range and unique selling points of products and services offered by the business.</b></p> <ul style="list-style-type: none"> <li>• Know the products and services offered to accommodate pre-need, at-need, post-need – for example, coffins, vehicles, orders of service, floral tributes, remembrance products, memorials, will writing, LPAs</li> </ul> <p><b>Where to find information regarding specialist products and services for example exhumation, repatriation and burial at sea.</b></p>	<p><b>Take a proactive approach to providing clients with product and service information within your area of responsibility.</b></p> <ul style="list-style-type: none"> <li>• Demonstrate excellent customer service by offering the full range of products and services to clients as appropriate</li> </ul> <p><b>Offer information and assistance with specialist services and products.</b></p>	<p><b>Promote the products and services offered by the business.</b></p> <p><b>Consistently work to personalise the funeral to the needs of the deceased, client, family, and friends.</b></p> <ul style="list-style-type: none"> <li>• Ensure that the client's needs are established by considerate questioning and personalised products and services provided</li> </ul>



Funeral arrangers must complete all of the following specialist functions

	Knowledge and Understanding (Know it)	Skills (Show it)	Behaviours (Live it)
<b>Arranging</b>	<p><b>The businesses' process for the care of the deceased.</b></p> <ul style="list-style-type: none"> <li>• Understand how to comply with identification procedures</li> <li>• The importance of dignity and respect at all times</li> <li>• Safe lifting and handling of the deceased</li> <li>• Encoffining and preparing the deceased</li> <li>• Performing first offices in line with client's wishes</li> </ul> <p><b>The third parties involved and the role they play in delivering client needs.</b></p> <ul style="list-style-type: none"> <li>• Crematoria, cemetery staff, doctors, trade embalmers, officiants, specialist products and service providers</li> </ul> <p><b>How to plan/arrange a funeral according to client's needs within legislative boundaries and local constraints, rules and regulations.</b></p> <ul style="list-style-type: none"> <li>• Conversation with the client, establishing need and matching products and services</li> </ul> <p><b>The importance of accurate calculation and completion of the client contract and the</b></p>	<p><b>Arrange, plan and assist in visits to the deceased, ensuring client's needs are respected at all times.</b></p> <p><b>Arrange at need or pre need funerals according to clients requirements, maintaining accurate records of all products and services ordered.</b></p> <p><b>Complete, discuss and agree client contracts efficiently and according to business guidelines.</b></p> <p><b>Gather and collate feedback from clients using the businesses approved systems and communication methods.</b></p>	<p><b>Confidently communicate with clients and third party service representatives with understanding, empathy and integrity. Use own initiative when carrying out arranging-activities.</b></p> <ul style="list-style-type: none"> <li>• Demonstrate confident business activities while recognising the limits of own authority</li> </ul>

	<p><b>implications to the business if not completed properly.</b></p> <ul style="list-style-type: none"> <li>• Implications - Damaged reputation, poor feedback, loss of trust and confidence within the local community</li> </ul>		
<b>Administration / Finance</b>	<p><b>The principles of operating commercially in a competitive industry.</b></p> <ul style="list-style-type: none"> <li>• Understands the competitor market and is able to explain the business position to the client</li> <li>• Understand the balance between operating commercially and delivering good service to the client</li> </ul> <p><b>The business administration / finance systems and how invoices are created.</b></p> <ul style="list-style-type: none"> <li>• Understand own business systems</li> </ul>	<p><b>Access and use systems accurately, efficiently and within legislation requirements.</b></p> <p><b>Maintain precise records of all products and services purchased by clients.</b></p> <p><b>Ensure the timely receipt of payments and finance agreements.</b></p>	<p><b>Consistently prioritise and arrange financial records and client accounts.</b></p> <p><b>Consistently review information and clerical processes for errors and make corrections before finalising administration / financial duties.</b></p> <ul style="list-style-type: none"> <li>• Lead by example</li> </ul>

Funeral Operatives must complete all of the following functions

	<b>Knowledge and Understanding (Know it)</b>	<b>Skills (Show it)</b>	<b>Behaviours (Live it)</b>
<b>Maintain and drive vehicles</b>	<b>The legal and business requirements for driving, maintaining and cleaning vehicles for example reporting damage.</b>	<b>Follow relevant legislation, codes of practice and business standards for driving, maintaining and cleaning business vehicles.</b>	<p><b>Show pride in maintaining and cleaning business vehicles.</b></p> <p><b>Remain calm and drive responsibly at all times.</b></p>

	<ul style="list-style-type: none"> <li>• Licensing requirements, Highway code, road worthiness of vehicles, MOT, servicing of vehicles</li> <li>• Understand business procedures for reporting damage etc.</li> <li>• Know how to drive in a funeral cortege</li> </ul> <p><b>The importance of knowing routes and planning contingency routes before setting off, keeping up-to-date and checking local disruptions to routes in advance.</b></p> <ul style="list-style-type: none"> <li>• Understanding the importance of route planning to ensure client confidence and to meet specific client requests</li> <li>• Know what a contingency plan is and how this can impact the smooth running of the day of the funeral</li> </ul>	<p><b>Use pre-arranged routes when driving business vehicles during funeral services and alternative routes when necessary reporting issues with routes to the appropriate person.</b></p> <ul style="list-style-type: none"> <li>• Demonstrates communication skills to share relevant information appropriately and to the right person to ensure the smooth running of the funeral</li> <li>• Demonstrate considerate driving skills when driving as part of a funeral cortege</li> </ul>	
<p><b>Care of the Deceased</b></p>	<p><b>How to handle, remove and move the deceased while maintaining dignity and respect.</b></p> <p><b>The environments, the equipment used and the importance of completing dynamic risk assessments to move the deceased.</b></p> <p><b>When and how to request additional support when carrying out the transfer of the deceased.</b></p>	<p><b>Transfer the deceased using correct techniques and maintaining client and business requirements.</b></p> <p><b>Assist in the preparation and presentation of the coffin and the deceased.</b></p> <ul style="list-style-type: none"> <li>• Prepare and present the deceased in line with customer requirements</li> <li>• Demonstrate correct cutting, fitting of the coffin plate</li> </ul>	<p><b>Be respectful of the deceased at all times.</b></p>

	<ul style="list-style-type: none"> <li>• Manual handling techniques, risk assessment</li> <li>• Understand how and when to request additional help as required</li> <li>• Understand the equipment and support available for the specific task / environment</li> </ul> <p><b>How to prepare and present the coffin and the deceased.</b></p> <ul style="list-style-type: none"> <li>• Know the company procedures and guidelines to prepare and present the coffin to meet the client's needs</li> <li>• Understand the different coffin furnishing and fittings available</li> </ul>	<ul style="list-style-type: none"> <li>• Demonstrate correct furnishing and fitting of the coffin</li> </ul>	
<p><b>Funeral</b></p>	<p><b>Pre-funeral checking procedures and your role for the 'day of the funeral' service.</b></p> <ul style="list-style-type: none"> <li>• Understand the checking procedures to correctly identify the deceased</li> <li>• Understand the importance of attending the pre-funeral briefing</li> </ul> <p><b>How to bear coffins or use appropriate equipment safely, professionally and in varying environments with dignity and respect.</b></p>	<p><b>Attend funeral briefings and use information to assist in the delivery of the funeral.</b></p> <ul style="list-style-type: none"> <li>• Participate fully in the funeral briefing and support colleagues to professionally and respectfully deliver the funeral</li> </ul> <p><b>Handle coffins and floral tributes safely and respectfully at all times.</b></p> <p><b>Carry out allocated duties with dignity and respect to ensure the smooth running of the funeral.</b></p>	<p><b>Actively and competently, participate in the smooth running of the funeral service.</b></p> <p><b>Remain calm and respectful in different situations and help colleagues to do the same.</b></p>

**How to identify and handle potential incidents and when to escalate to an appropriate person.**

- Understand the importance of risk assessment to establish the safe working practises for the funeral
- Understand the importance of checking that equipment is available, set up and in safe working order (for example, wheel biers, trolleys and trestles)
- Know how and when to escalate a hazard / potential incident if necessary