

# Employer Occupational Brief

A guide to apprenticeship training and on-programme  
assessment

**Funeral Director**

**February 2019**

## Overview of the job role

A funeral director has overall responsibility for the client and the deceased by arranging, conducting and managing the funeral. The funeral director will act as a role model, mentor and coach to the team. They will liaise with a wide range of other organisations and services on behalf of the client to deliver the funeral. On the day of the funeral, a funeral director briefs and leads the team and is the central point of contact, coordination and escalation of feedback. Creating and developing sensitive working relationships with clients and stakeholders such as suppliers, the police, coroners and medical personnel is a key part of the role. Funeral directors are the first point of contact for colleagues regarding specialist funeral services such as exhumation, bequeathal, repatriation, military funerals, burial at sea and multiple funerals. Day to day operations include planning and coordinating arrangements and resources for funerals; overseeing pre-funeral checks; ensuring the funeral meets the needs of the client; assisting in the preparation and presentation of coffins and the deceased; delivering third party products and services; pre-need and aftercare services. Funeral directors must act as an ambassador by upholding the reputation and professional image of the business and actively develop relationships within the local community. They will converse with local customs and practices (all denominations and faiths) and utilise market data to become the funeral director of choice in the area. Funeral directors will work out-of-hours on a rota basis and cover a variety of roles within the funeral sector both on and off site.

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:**

	Knowledge and Understanding (Know it)	Skills (Show it)	Behaviours (Live it)
Client	<p>How to support team members to establish client needs and wishes when dealing with clients during the grieving process.</p> <ul style="list-style-type: none"> <li>• Mentor/buddy systems to support team members, online resources, business help line, classroom/training sessions</li> </ul> <p>The importance of accurately assessing client needs.</p> <ul style="list-style-type: none"> <li>• Affordability, meeting budgets, retaining business customer service reputation, repeat business, recommendations</li> </ul> <p>The profile of the current client base and the business aims and objectives for client services.</p> <ul style="list-style-type: none"> <li>• Know where to find the information regarding customer base</li> <li>• Understand the business aims and objectives for client services</li> </ul> <p>The importance of acting on behalf of the client.</p> <ul style="list-style-type: none"> <li>• Importance of meeting the customer needs and accurate interpretation of customer information</li> </ul> <p>How to handle client concerns, complaints and compliments escalated to them.</p> <ul style="list-style-type: none"> <li>• Principles of complaint handling, managing investigations and resolving issues</li> </ul>	<p>Lead the team to use established strategies when handling grieving clients.</p> <ul style="list-style-type: none"> <li>• Team briefings, performance reviews, mentoring</li> </ul> <p>Build a rapport with clients anticipating their requirements and providing excellent service.</p> <p>Handle and resolve clients concerns, complaints and compliments.</p> <ul style="list-style-type: none"> <li>• Demonstrate effective problem solving and issue resolution</li> </ul>	<p>Lead the team to use empathy and sensitivity during all interactions with clients from first call through to final contact.</p> <p>Act as a role model remaining calm, managing concerns, complaints and compliments and seeking resolutions in a timely manner.</p>

	Knowledge and Understanding (Know it)	Skills (Show it)	Behaviours (Live it)
Reputation	<p>How to manage the protection of the business reputation based on business values, vision, aims and behaviours. How technology and applications affect business objectives and reputation.</p> <ul style="list-style-type: none"> <li>Understand the business policy and procedures for use of social media and email etiquette</li> </ul> <p>The market share of the business and their competition.</p> <ul style="list-style-type: none"> <li>Know local competitors and the market share/position in the market</li> </ul> <p>The local demographic/community and how to use it to cultivate a positive reputation of the business.</p> <ul style="list-style-type: none"> <li>Understand local demographic regarding age, religion and ethnicity</li> <li>Know the specific funeral requirements for the community in which you work</li> </ul>	<p>Lead a service, which delivers business vision and values when dealing with clients, colleagues and all stakeholders.</p> <p>Work to improve the profitability and reputation of the business whilst being respectful to competitors.</p> <ul style="list-style-type: none"> <li>Follow organisational guidelines to maintain commercial viability of the business while balancing the needs of the client</li> </ul> <p>Create opportunities to introduce / promote the business at local events, assist with fund raising and support community services.</p> <ul style="list-style-type: none"> <li>Demonstrate community involvement by taking part in and organising events and activities</li> </ul> <p>Manage and monitor the appropriate use of technologies meeting business objectives.</p> <ul style="list-style-type: none"> <li>Customer feedback, observation of team performance and behaviours</li> </ul>	<p>Be an ambassador and lead by example to create a positive impression of the business at all times.</p> <p>Analyse information to keep informed of reputation, market share and competitors.</p> <ul style="list-style-type: none"> <li>Data analysis, networking</li> </ul> <p>Organise events in the local community utilising the skills of the team.</p> <p>Create opportunities to use technology in responsible and innovative ways.</p> <ul style="list-style-type: none"> <li>Use of technology/systems to share resources across the business</li> <li>Use of social media to promote community events and celebrate success</li> </ul>

	Knowledge and Understanding (Know it)	Skills (Show it)	Behaviours (Live it)
Leadership	<p>How to organise the team on a daily basis to achieve short and long-term objectives. How and why to carry out a team brief / debrief.</p> <ul style="list-style-type: none"> <li>Resource planning, rotas, team briefings, information/feedback sharing</li> </ul> <p>Team dynamics and different leadership styles.</p> <ul style="list-style-type: none"> <li>Understanding the differing team operations and individuals</li> <li>Understand the importance of the differing team roles and responsibilities</li> <li>How to determine individual leadership style</li> <li>Know the positive / negative impact of different leadership styles</li> </ul> <p>How to lead by example and the importance of doing so.</p> <p>The importance of and how and when to make contingency plans.</p> <ul style="list-style-type: none"> <li>Understand the impact to the client, team and business in ensuring that contingency plans are in place</li> </ul> <p>How to support team members during the funeral arrangement process.</p> <ul style="list-style-type: none"> <li>Understand the importance of mentor/buddy systems</li> <li>Know the benefits of regular discussions with team members</li> </ul>	<p>Supervise and manage the day-to-day running of the business.</p> <p>Carry out briefings and debriefings to organise the team to meet business objectives.</p> <p>Lead the team effectively responding positively to different group dynamics and personalities.</p> <p>Design and manage contingencies according to own role and business needs.</p> <p>Act within limits of own authority making decisions and escalating to business decision makers/stakeholders when necessary.</p> <ul style="list-style-type: none"> <li>Use of public sector advisory services or organisation support teams</li> </ul>	<p>Adopt a leadership style that contributes to a harmonious, inclusive and safe work environment.</p> <p>Respond positively and calmly using own initiative to create solutions and seek assistance when necessary.</p> <p>Share positive feedback, successes and key learnings with the team and stakeholders.</p>

	Knowledge and Understanding (Know it)	Skills (Show it)	Behaviours (Live it)
	<p>Limits of own authority within the business and who decision makers/stakeholders are in the business.</p> <ul style="list-style-type: none"> <li>The business procedures for the escalation of issues / problems</li> </ul>		
<b>Legal and Governance</b>	<p>All legislation relating to the sector, including the roles and responsibilities of external agencies and authorities.</p> <ul style="list-style-type: none"> <li>Health &amp; safety, manual handling, COSHH, Riddor, GDPR.</li> </ul> <p>Business governance requirements relating to funeral procedures and working with the deceased and the client.</p> <ul style="list-style-type: none"> <li>Understand the business policies and procedures</li> </ul> <p>The legalities surrounding specialist funeral services.</p> <ul style="list-style-type: none"> <li>Relevant funeral legislation (for example, burial at sea, exhumation, burial location)</li> </ul>	<p>Apply legal requirements for the sector whilst supervising staff working with external agencies and authorities.</p> <ul style="list-style-type: none"> <li>Follow business guidance in the supervisions of all internal and external team members</li> </ul> <p>Supervise operations according to the business' governance, policies and procedures.</p> <p>Organise and support colleagues to coordinate specialist funeral services within legal requirements.</p>	<p>Lead by example, working safely, honestly and with integrity and respect at all times.</p> <p>Promote good working practices in line with all relevant legislation.</p>
<b>Personal development and performance</b>	<p>The importance of and know how to develop self and team.</p> <ul style="list-style-type: none"> <li>Know the tools and options available to identify development needs</li> </ul> <p>How development affects both business and team objectives.</p>	<p>Facilitate continuous professional development activities and use newly acquired skills and knowledge to improve business, self and others.</p> <ul style="list-style-type: none"> <li>Share newly acquired skills and indicate the benefits of these skills to self and the business</li> </ul>	<p>Positively challenge and manage performance of self and others, identifying strengths and areas for development.</p>

	Knowledge and Understanding (Know it)	Skills (Show it)	Behaviours (Live it)
	<p>Where and how to source development activities for self and team.</p> <ul style="list-style-type: none"> <li>Internal courses and their availability, external course, costs and availability</li> </ul> <p>The importance of acting as a role model, mentor and coach for your team.</p>	<p>Research, source and implement development activities.</p> <p>Identify training needs with team members, arrange and/or deliver development activities to others.</p> <ul style="list-style-type: none"> <li>Demonstrate TNA and use of performance review information</li> </ul>	<p>Inspire and motivate others through coaching and mentoring.</p>
<b>Products and services</b>	<p>The developments in industry products and services and where to access information regarding these.</p> <ul style="list-style-type: none"> <li>Trade journals, conferences, trade shows, online, news reports, supplier information, networking across community and wider industry</li> </ul> <p>The importance of keeping the team up to date with new and current products and services.</p> <p>How to promote products and services to the team and local community.</p> <ul style="list-style-type: none"> <li>Team briefings, sharing ideas and best practise, community talks, open days</li> </ul>	<p>Cascade up-to-date information to the team regarding new and current products and services.</p> <p>Empower the team to be confident when offering choice to the client.</p> <ul style="list-style-type: none"> <li>Share information, build confidence and support the team to offer a full range of products and service to the client</li> </ul>	<p>Ethically promote own business and improve profitability.</p> <ul style="list-style-type: none"> <li>Offer freedom of choice to customers without negative reference to competitors</li> </ul>
<b>Communication</b>	<p>How to support effective communication, quickly determining the situation and needs of individuals.</p> <ul style="list-style-type: none"> <li>Understand how to use communication methods (active listening, probing questions) to effectively determine the needs of individuals</li> </ul> <p>How to respond in the most appropriate way using a variety of techniques.</p> <ul style="list-style-type: none"> <li>How to consider the situation, the individual and business guidelines in order to choose appropriate responses</li> </ul>	<p>Give appropriate responses to all forms of communication, showing an ability to interpret a range of cues.</p> <ul style="list-style-type: none"> <li>Demonstrate the use of business guidance and the ability to adapt responses according to the situation and individual</li> </ul> <p>Monitor the effectiveness of and encourage excellent communications across all operations that achieve the best result for the business.</p>	<p>Promote the use of effective communication methods.</p> <ul style="list-style-type: none"> <li>Role model best practise</li> </ul>

	Knowledge and Understanding (Know it)	Skills (Show it)	Behaviours (Live it)
	<p>The way that technology assists with internal and external communications according to business guidelines.</p> <p>The importance of managing and avoiding conflict.</p>	<ul style="list-style-type: none"> <li>Gather customer feedback, colleague feedback, performance reviews</li> </ul>	
<b>Administration and Finance</b>	<p>The business operating procedures, for example the processing and security of donations and debt management.</p> <ul style="list-style-type: none"> <li>Understanding the measures necessary to prevent the non-payment of funerals</li> <li>Understanding the organisation's debt management process and the role that the funeral director plays in this</li> </ul> <p>The principles of operating commercially and ethically (social responsibility).</p> <ul style="list-style-type: none"> <li>Understanding commercial acumen to balance the needs of the business with those of the client</li> <li>Understand the importance of operating ethically and with social responsibility and the impact this can have on the business</li> </ul> <p>Future client markets to help grow the business.</p> <ul style="list-style-type: none"> <li>Understand the current market and how this is predicted to change</li> <li>Know the impact that future markets will have on the business and the changes necessary for it to grow and develop</li> </ul> <p>The need to gather feedback, analyse it and its contribution to business improvements.</p>	<p>Manage business information systems and procedures.</p> <p>Use ethical practices to support profitability and maintain own business' social responsibilities.</p> <ul style="list-style-type: none"> <li>Balancing the client's wishes with the affordability of the funeral</li> </ul> <p>Analyse management information and suggest ways to improve business performance.</p>	<p>Work ethically when operating and supervising administrative and financial duties.</p>



	Knowledge and Understanding (Know it)	Skills (Show it)	Behaviours (Live it)
	<ul style="list-style-type: none"> <li>Understand the business processes to gather feedback</li> <li>Understand how to analyse the information and how to feed this into the business</li> </ul>		
<b>Funeral</b>	<p>The importance of and how to monitor pre-funeral checks in accordance with business needs.</p> <ul style="list-style-type: none"> <li>Understand the importance of overseeing the ID check of the deceased and that the arrangements have been completed in line with the client's needs</li> <li>Know the business procedure to monitor the pre-funeral checks</li> </ul> <p>How to plan, resource and conduct a funeral in accordance with the client's wishes.</p> <ul style="list-style-type: none"> <li>Know the business procedures required to plan and resource a funeral</li> <li>Understand the processes required to ensure that the funeral is conducted according to clients wishes – booking crematoria/purchasing a grave where appropriate, booking an officiant, organising paperwork, organising resources (cars, colleagues, flowers)</li> </ul>	<p>Show ability to take control and ownership of events on the day of the funeral.</p> <ul style="list-style-type: none"> <li>Demonstrate efficient monitoring of pre-funeral checks</li> <li>Carry out team briefings to ensure all staff are aware of the role they will be carrying out on the day of the funeral</li> <li>React efficiently and appropriately to issues/incidents</li> </ul>	<p>Lead by example and manage funeral services in a calm and respectful way, handling conflict when necessary.</p>