

Sample Position Description

POSITION TITLE:	Advance Planning Specialist
SUPERVISOR:	Manager or Funeral Home Director
DATE:	Current Year
OBJECTIVE:	Generate preneed sales for the funeral home using the most ethical sales techniques.
PREREQUISITES:	Current state license to sell insurance or be eligible to acquire that license. Maintain eligibility for renewal.

Responsibilities/ Expectations

(specify all according to your firm's needs; use the guidelines below as minimum standards):

A. Generate & manage leads

- Use funeral home records to generate leads from
 - At need files
 - Current families
- Generate leads from the following
 - Referrals
 - Aftercare
 - Group presentations
 - Direct mail
 - Unfunded prearrangements
- Achieve minimum performance standards through the following
 - 30 new contacts made daily (100-150 per week) OR 2-3 appointments scheduled per day
 - Daily time scheduled to appropriate aftercare activities – follow up calls, visitations, delivering materials, etc.
- Maintain organized approach through use of to do list, based on lead management reports
- Keep accurate, up to date information on each lead AS ACTIVITY OCCURS
- Use firm chosen lead management system according to instruction

B. Make appointments with potential customers

- Set 10-15 appointments per week
- Use appropriate telephone contact methods to obtain appointments
- Apply scripts to appointment setting activities

C. Plan and make presentations to potential customers

- Make a minimum of 6 presentations per week
- Use a consistent presentation method, per instruction
- Effectively explain the benefits of prearranging, manage customer concerns and guide decision-making per instruction
- Ask appropriate questions and listen attentively to identify customer needs and to clarify information
- Accurately answer questions regarding funeral home services and merchandise
- Describe funding options fully and accurately
- Close sales professionally
- Obtain referrals from each positive appointment
- Sell an average of 2.5 contracts per week or maintain an average minimum of \$12,500 in gross sales volume per week
- Maintain a minimum annual persistency of 90%
- Maintain a minimum closing ratio of 50%
- Submit all contracts and related paperwork per instruction

D. Submit appropriate business

- Help potential customers choose the funding plan that best suits their needs
- Complete all related paperwork neatly and accurately
- Establish and maintain appropriate files
- Follow up with purchasing customers per instruction

E. Conduct at least 1 group presentation per quarter

- Create a list of organizations to which presentations might be made in each location/ community being served
- Contact group leaders via letter and/or phone call to schedule presentations
- Use professional presentation skills to meet the needs of the audience and communicate the appropriate messages related to the funeral home and its services