



Job Description

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| Position: | Family Service Advisor |
| Location: | Calvary Funeral and Cemetery Services |
| Position Status: | Full Time |
| Schedule: | In office Monday thru Saturday (5 days as assigned) 8:00am – 4:30pm or 8:30am – 5:00pm with a half hour lunch and occasional off-site meetings and evening meetings. |
| Category: | Non-Exempt |
| Pay Rate: | \$25.00 per hour + Commission |

Supervisor: Sales Manager or another manager as may be assigned

Catholic Funeral & Cemetery Services of the Diocese of Sacramento, Inc. (CFCS) is committed to serving all members of the Diocese of Sacramento in a dignified and compassionate manner. We strive to live up to our mission by being an open resource and providing exemplary service. Employees of CFCS are expected to act in accordance with the values and goals of the Diocese of Sacramento.

Position Summary: A Family Service Advisor (FSA) is committed to meeting the goals and objectives of CFCS, which include, but are not limited to, serving families that come to or contact our cemeteries and funeral homes to arrange “at-need” and “pre-need” burials and as well as “pre-need” funerals; make follow up calls and contacts providing assistance to families; generating sales leads and referrals; completing sales to meet sales goals; coordinating and collecting payments; and establishing and maintaining effective communication and coordination of efforts within the funeral homes and other cemetery staff.

Advisors are required to conduct themselves in a professional manner to promote a cooperative, service-oriented work environment. The FSA reports to the Director of Sales (or another manager as may be assigned). Performance evaluations will be completed by the supervising manager (and may include input from other managers).

Duties and Responsibilities:

1. Counsel families making “at need” and “pre-need” burial arrangements as well as “pre- need” funeral arrangements. Must work with manager and coordinate all Cemetery details for committals with our funeral center and outside funeral homes for families to plan, set and execute the committal without error.

2. Must be able to communicate and coordinate with the family, our funeral and cemetery teams, and the respective funeral home when necessary.
3. Develop a rapport with families with an emphasis on ministry and service. Provide information to families allowing them to make well informed cemetery and/or “pre- need” funeral arrangements.
4. Must acquire and retrain knowledge of policies and procedures to assist families with any changes or exchanges of cemetery line items or pre-need funeral plans to complete company change orders in a timely manner.
5. Communicate clearly and effectively with grounds staff to ensure all documents, maps, and work orders are uploaded and accurately set on all committal calendars.
6. May need to meet the funeral cortege at the place of internment and remain throughout the Committal Service to help and support to the family.
7. Assist families with the development, design, and approval of memorials.
8. Address any family complaints and advise their supervisor on all family complaints immediately.
9. Comply with all Diocese of Sacramento and CFCS policies, instructions, and directives.
10. Serve families based on a rotation schedule as set forth by Management.
11. Attend scheduled training and sales meetings.
12. Participate in Parish and Community Outreach events.
13. Seek opportunities in non-traditional Community Outreach activities that reach out to CFCS targeted demographics.
14. Accurately prepare and process a variety of documents including burial books, card files, sales maps, contracts, work orders, receipts and other forms as needed.
15. Assist in the training of fellow Family Service Advisors as required.
16. Meet and exceed minimum standards as listed in the Commission Policy.
17. Utilize FACTS (or other assigned database management software) for managing leads, other family activity, and monitoring status assignments.
18. Follow up on all leads in a timely manner as assigned by management with the focus on setting appointments for Advanced Planning.
19. Perform other duties as may be assigned.

Education and Experience:

1. High school diploma (or GED) required; college graduate preferred.
2. 3-4 years' experience in sales, customer service and/or related fields resulting in direct public contact.
3. A successful and documented track record.

Knowledge, Skills and Abilities:

1. Possess a valid California Driver's License and proof of insurance.
2. Pass a background check.
3. Possess knowledge of Catholic Cemeteries and Family Services Program policy and procedure.
4. Interpersonal skills including tact, patience, and diplomacy.
5. Understanding of modern office methods and procedure including Words, Xcel, and other software programs.
6. Basic math computations.
7. Possess strong oral and written communication skills as well as interpersonal skills.
8. Bi-lingual (Spanish or Tagalog) preferred.

Physical Requirements:

1. Involves sitting, standing, and walking, plus some occasionally exert up to 30 pounds of force to move objects.
2. Physical agility required moving downward and/or forward by bending legs and spine.
3. Physical ability to sustain movements, especially of the fingers, wrists hands and/or arms.
4. Ability to express or exchange information by means of the spoken or written word.

These requirements are representative of minimum levels of required knowledge, skills, and abilities. Responsibilities may vary according to projects, cemetery site activity and size of workforce.

CFCS & Catholic Funeral and Cemetery Services reserves the right to amend this job description at its discretion. A revised job description supersedes all previous job descriptions for the position as a condition for employment. Job description will be duly distributed as revised.