



## Position Description

**Position:** Cemetery Family Service Advisor  
**Reports to:** Director of Catholic Cemeteries  
**Effective date:** November 14, 2018

**FLSA:** Exempt

**Grade:**

**General Summary:** Family Service Advisors serve families with care and compassion, while educating and guiding them through the process of making informed decisions for Cemetery & Funeral Advanced Planning, At-Need Cemetery, and Memorialization products and services. Family Service Advisors will demonstrate by example, CFCS' Core Values—Share the Journey, Serve with Care, and Make It Happen—in all their dealings with families, staff, and internal/external contacts.

### **Essential Duties and Responsibilities:**

#### *Family Service – At-Need / Advanced Planning*

- Ensure the highest standards for The CFCS Way and the “Family First experience” through training and professional development
- The FSA and FSD, together, meet with families and follow The CFCS Way for At-Need Cemetery and At-Need Funeral processes and procedures
- Follow The CFCS Way for Advanced Planning processes and procedures
- Educate families on the Order of Christian Funerals and Mission Programs
- Educate families in making informed decisions for selecting a cemetery property and funeral products and services
- Educate families on creating a “Family Legacy” and show available estate properties
- Complete post-arrangement tasks and administration per procedures
- Share the journey with families by being present at the committal service
- Be proactive in asking for referrals of family members, friends, neighbors, etc.
- Meet or exceed CFCS expectations for lead generation, appointment setting, follow-up, and Advanced Planning revenue targets
- Demonstrate professionalism and uncompromising integrity in all family dealings

#### *Family Service – Memorialization*

- Share the journey with the family, follow the Memorialization process from design through fulfillment, and ensure effective communications with both family and staff
- Set memorialization appointments 1-5 days following the committal service
- Educate families on the many options for memorialization products
- Educate and guide families based on their needs through the process for designing a loved one's memorialization

#### *Outreach & Community Events*

- Participate in parish outreach and community events to educate families on the Order of Christian Funerals, CFCS Mission Programs and services, and the benefits of Advanced Planning
- Contact leads/referrals to schedule appointments and make Advanced Planning presentations
- Make complete and accurate entries in the CRM, including detailed notes
- Follow-up and follow-through on appointments scheduled and presentations delivered

## *Administration*

- Follow CFCS policies and procedures for contract administration and records management
- Effectively use cemetery/funeral software, CRM, systems, and tools
- Develop a discipline for using job aids to increase personal productivity, time efficiency, and effectiveness
- Participate in CFCS location, classroom, and online training, and self-directed learning
- Regular attendance is essential for this position.
- Performs other related duties as assigned by supervisor.

## **Knowledge, Skills, and Abilities Required**

- College degree preferred, and/or 2-4 years working in a sales environment having face-to-face contact with the customer
- Understanding of the Order of Christian Funerals
- Able to conduct oneself with a “Family First” approach
- Knowledge of processes, principles, and methods for selling products and services
- Record of accomplishment in networking, developing leads, contacting referrals, setting appointments, and meeting monthly sales goals
- Excellent interpersonal and communication skills, both in person and on the telephone
- Highly organized, detail oriented, and excellent time management skills
- Ability to work and make decisions under pressure and tight deadlines
- Proficient in the use of computers, software, and technology
- Bilingual preferred
- Valid state issued driver’s license, good driving record, and proof of insurance is required
- The ability to respect, promote, accommodate, and not be in conflict with the mission, moral and social teachings, doctrines, and laws of the Roman Catholic faith.
- Exercises considerable independence and judgment with a high level of confidentiality, working with sensitive and privileged information.
- Must be able to organize and prioritize work, be proactive, take initiative, resolve complex problems, follow through, and simultaneously manage multiple priorities.
- Must successfully pass the required background check and all requirements of the Diocesan Program for Child and Youth Protection prior to employment and maintain a satisfactory background check throughout employment.

## **LANGUAGE SKILLS**

Ability to read, analyze, and interpret general business periodicals, professional journals, technical procedures, or governmental regulations. Ability to write reports, business correspondence, and procedure manuals. Ability to effectively present information and respond to questions from groups of managers, clients, vendors, employees, and the general public.

## **MATHEMATICAL SKILLS**

Ability to add, subtract, multiply, and divide in all units of measure, using whole numbers, common fractions, and decimals. Ability to compute rate, ratio, and percent and to draw and interpret bar graphs.

## **REASONING ABILITY**

Ability to define problems, collect data, establish facts, and draw valid conclusions. Ability to interpret an extensive variety of technical instructions in mathematical or diagram form and deal with several abstract and concrete variables.

**PHYSICAL DEMANDS**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is regularly required to stand; walk; sit; use hands to finger, handle, or feel; reach with hands and arms; climb or balance; stoop, kneel, crouch, or crawl; and talk or hear. The employee must regularly lift and/or move up to 20 pounds. Specific vision abilities required by this job include close vision, distance vision, and ability to adjust focus.

**WORKING CONDITIONS**

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

The noise level in the work environment is usually moderate. Position may require some evening and weekend hours.

**Receipt and Acknowledgement**

I acknowledge that I have been given a copy of this position description. I have read it and understand it. I am responsible for complying with all position duties, requirements and responsibilities contained herein, and any subsequent revisions.

This position description has been designed to indicate the general nature and level of work performed by employees within this classification. It is not designed to contain or be interpreted as a comprehensive inventory of all duties, responsibilities and qualifications required of employees assigned to this position.

I understand and agree that the position description is presented as a matter of information only, and is not to be construed as a contract between the Diocese of Toledo Cemeteries Corporation and its employees.

\_\_\_\_\_  
Employee Printed Name

\_\_\_\_\_  
Employee Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Supervisor Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Senior Director Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Approved by Director of Human Resources

\_\_\_\_\_  
Date

All new or revised position descriptions must be approved by the Director of Human Resources

*This position description is aligned to Catholic Funeral Cemetery Services descriptions.*