

Agree and arrange a pre-planned funeral with clients

Overview

This standard is about agreeing and arranging pre-planned funerals with clients. It is about explaining to clients all the options, pre-requirements and costs involved in a funeral pre-plan.

This standard is for funeral directors, funeral director assistants, funeral arrangers and funeral planners.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Agree and arrange a pre-planned funeral with clients

Agree and arrange a pre-planned funeral with clients

Performance criteria

You must be able to:

1. comply with the relevant legislation and your funeral businesses' policy, procedures and codes of practice when arranging to meet with clients who want to discuss pre-planned funeral options
2. explain the purpose, benefits and value to the client of a pre-planned funeral
3. reassure the client of confidentiality and follow relevant codes of practice, legislation and your funeral business's policies and procedures for maintaining confidentiality
4. explore with the client the range of options offered by your funeral business for a pre-planned funeral
5. explain all the funeral plan costs including:
 - additional costs not covered by the plan
 - staged payment options or payment up front
 - payment on death
6. calculate the all funeral plan costs incurred in connection with pre-planned funerals
7. inform clients about the financial legislation and cooling off periods relating to payments and agreements
8. present and discuss alternative options if the client's expectations alter during the funeral pre-planning process
9. adjourn the meeting and provide further contact information when clients cannot reach an immediate decision,
10. follow your funeral business' procedures when a client agrees and confirms the pre-funeral plan
11. record all required details for setting up finance arrangements with the client using your funeral business' and relevant third party financial documentation
12. provide the client with your funeral business' documentation and relevant financial information when they have agreed a funeral pre-plan
13. use effective closing techniques to bring a funeral pre-plan meeting to a satisfactory end

Agree and arrange a pre-planned funeral with clients

Knowledge and understanding

You need to know and understand:

1. the relevant legislation and your funeral business' policies, procedures and codes of practice for meetings with clients who want to arrange a funeral pre-paid funeral plan
2. the purposes, benefits and value to both the client and your funeral business of having a pre-planned funeral
3. why confidentiality is important to the client and your funeral business
4. the relevant legislation that cover confidentiality of client information
5. the full range of pre-planned funeral arrangement options offered by your funeral business
6. the payment terms and financial arrangements of pre-planned funerals offered by your funeral business
7. why clients need to know about the financial legislation and cooling off periods relating to payments and agreements
8. when to adjourn meetings when clients cannot decide on a pre-planned funeral
9. why you need to confirm all the pre-planned funeral details before agreeing a funeral pre-plan with client
10. how to calculate the funeral plan costs and confirm with clients their understanding of additional costs that can be incurred
11. what is the financial legislation covering financial arrangements between your funeral business and the client
12. how to provide relevant written confirmation to the client reflecting their requirements effective closing techniques to bring meetings to an end

Agree and arrange a pre-planned funeral with clients

Scope/range

Client

1.1 Those with terminal illness or short life expectancy

1.2 Those who are pre-planning for requirements in the medium to long term

Agree and arrange a pre-planned funeral with clients

Links to other NOS

The standards in the funeral operations suite should be complemented by pan-sector standards such as working relationships, business, administration and resource management, as well as any other specific requirements of the employer.

Agree and arrange a pre-planned funeral with clients

Developed by	People 1st
Version Number	2
Date Approved	February 2022
Indicative Review Date	March 2027
Validity	Current
Status	Original
Originating Organisation	People 1st International Ltd
Original URN	PPLFOS24
Relevant Occupations	Funeral arranger; Funeral director; Funeral Director's Assistant; Funeral services attendant; Funeral services operative
Suite	Funeral Services
Keywords	Funerals; funerary; undertakers; undertaking; identifies; identifying; requirements; undertaking; identifies; identifying; requirements