

Title: Family Service Advisor
Employer: Diocese of Sacramento, Catholic Funeral & Cemetery Services
Supervisor: Director of Sales (or other manager as may be assigned)
Employment Status: Exempt

The Diocese of Sacramento and its ministry, Catholic Funeral & Cemetery Service (CFCS) are committed to serving all members of our community 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; 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 other managers as may be assigned). Performance evaluations will be completed by the supervising manager with 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.
- 2.) 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.
- 3.) May need to meet the funeral cortege at the place of internment and remain throughout the Committal Service to offer assistance and support to the family.
- 4.) Assist families with the development, design and approval of memorials.
- 5.) Address any family complaints and advise their supervisor on all family complaints immediately.
- 6.) Comply with all Diocese of Sacramento and CFCS policies, instructions and directives.
- 7.) Serve families based on a rotation schedule as set forth by Management.
- 8.) Attend scheduled training and sales meetings.
- 9.) Participate in Outreach events.

- 10.) Seek opportunities in non-traditional Community Outreach activities that reach out to CFCS targeted demographics.
- 11.) Accurately prepare and process a variety of documents including burial books, card files, sales maps, contracts, work orders, receipts and other forms.
- 12.) Assist in the training of fellow Family Service Advisors as required.
- 13.) Meet and exceed minimum standards as listed in the Commission Policy.
- 14.) Utilize FACTS (or other assigned database management software) for lead and other assignments.
- 15.) Follow up on all leads in a timely manner with the focus on setting appointments for Advanced Planning.
- 16.) Perform other duties as may be assigned.

Education and experience:

- 1.) Graduation from high school required; college graduate preferred.
- 2.) Experience in sales, customer service or related fields resulting in direct public contact.
- 3.) A successful 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.
- 6.) Basic math computations.
- 7.) Possess good 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 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.

Employee Name (Please Print)

Employee Signature

Date

Supervisor Name (Please Print)

Supervisor Signature

Date