



Preplanning Specialist

Location: Starkson Family Funeral Homes in Hastings and Apple Valley.

Job Type: Full-time

Reports To: Sales Manager

Summary:

The Preplanning Specialist is a compassionate and dedicated professional responsible for guiding individuals and families through the process of making funeral and cremation arrangements in advance. This role requires a unique blend of empathy, excellent communication skills, and a strong understanding of funeral service options, financial planning, and state regulations. The Preplanning Specialist plays a crucial role in providing peace of mind to clients by ensuring their final wishes are honored and relieving their loved ones of difficult decisions during a time of grief.

Key Responsibilities:

Client Consultation & Education:

- Conduct sensitive and informative consultations with individuals and families interested in pre-planning funeral or cremation services.
- Educate clients on the various options available, including traditional burials, cremation, memorial services, celebration of life events, and related products (caskets, urns, vaults, etc.).
- Clearly explain the benefits of pre-planning, such as spending down for county assistance, expressing personal wishes, and easing the burden on family.
- Provide detailed information on payment options, including pre-need insurance.

Needs Assessment & Customization:

- Actively listen to clients' preferences, values, and financial considerations to help them make informed decisions.
- Assist clients in documenting their specific wishes, including service details, disposition choices, personalization options, and final resting place.
- Customize pre-need plans to meet the unique needs and desires of each individual or family.

Sales & Service Excellence:

- Generate new leads through community outreach, networking, referrals, and internal initiatives.
- Follow up with prospective clients in a professional and timely manner.
- Present pre-need solutions ethically, focusing on the value and peace of mind provided.
- Process all pre-need contracts accurately and efficiently, ensuring compliance with all regulatory requirements.
- Maintain detailed and organized client records.

**Community Engagement & Outreach:**

- Represent the funeral home at community events, health fairs, senior centers, and other gatherings to promote pre-planning services.
- Deliver presentations, workshops, and seminars on the importance of pre-planning to various groups.
- Build and maintain positive relationships with community organizations and referral sources.

Collaboration & Support:

- Work collaboratively with funeral directors and administrative staff to ensure seamless service delivery.
- Provide support and information to at-need families when pre-arranged services are activated.
- Stay current with industry trends, license regulations, and product offerings.

Compliance & Ethics:

- Adhere to all federal, state, and local laws and regulations governing pre-need arrangements and funeral services.
- Uphold the highest ethical standards in all client interactions and business practices.
- Maintain client confidentiality.

Qualifications:**Education:**

- High school diploma or equivalent required. Associate or bachelor's degree in mortuary science, business, marketing, counseling, or a related field preferred.

Experience:

- Minimum of 1 year of experience in sales, customer service, or a related field, preferably within the funeral, insurance, or financial services industry.
- Experience with pre-need funeral arrangements is highly desirable.

Licenses/Certifications:

- Current and valid state-issued driver's license.
- Valid state life insurance license or ability to obtain within a specified timeframe.
- Other relevant certifications (e.g., Certified Preneed Counselor - CPC).

Skills:

- Exceptional interpersonal and communication skills (written and verbal).
- Strong active listening and empathy skills.
- Proven sales and negotiation abilities.
- Excellent organizational and time management skills.
- Proficiency in Microsoft Office Suite (Word, Excel, Outlook) and CRM software.
- Ability to work independently and as part of a team.
- Professional demeanor and appearance.
- Compassion, patience, and sensitivity when dealing with delicate topics.
- Knowledge of funeral service customs, traditions, and products.

**Compensation & Benefits:**

Salary: \$60,000-\$100,000 annually

Health, Dental, and Vision Insurance for employee and family

80 hours PTO (Paid Time Off)

401K Match after 1 year of employment

Working Conditions:

Primarily office-based, with regular travel for client meetings, community events, and home visits.

May require occasional evening and weekend work to accommodate client schedules and events.

Exposure to sensitive and emotional situations requiring a high degree of professionalism and composure.

Physical Requirements:

Ability to sit or stand for extended periods.

Ability to lift and carry up to 20 pounds occasionally.

Manual dexterity to operate computer and office equipment.

To Apply:

Please submit your resume and cover letter detailing your relevant experience and why you are interested in this position to michael@starksonfamily.com.

Starkson Family is an Equal Opportunity Employer.

