



Australian Government

Department of Education, Employment and Workplace Relations

SIFSLS002A Sell pre-need funeral and burial products and services

Revision Number: 1

SIFSL002A Sell pre-need funeral and burial products and services

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to sell pre-need funeral and burial products and services ensuring that client needs are met.
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Application of the Unit

Application of the unit	This unit applies to funeral home and cemetery and crematorium staff involved in the sale of pre-need funeral products and services. It involves identifying and responding to client needs and completing sales.
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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	Nil
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Employability Skills Information

Employability skills	This unit contains employability skills.
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Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.

Performance criteria describe the required performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge and/or the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT

PERFORMANCE CRITERIA

- | | |
|---|--|
| 1 Identify needs of client. | 1.1 Select and use appropriate <i>communication techniques</i> to identify client's particular needs.
1.2 Provide clients with information about range of available <i>pre-need products and services</i> .
1.3 Locate information from <i>other sources</i> or refer clients to <i>appropriate personnel</i> , where information is not immediately available. |
| 2 Respond to client needs using sales principles. | 2.1 Use <i>product knowledge</i> to match pre-need products or services to client needs.
2.2 Use appropriate communication techniques to provide knowledge of benefits and features of pre-need product or service to clients.
2.3 Provide options and suggestions for personalising available products and services based on client needs.
2.4 Identify, monitor and respond to <i>client buying signals</i> .
2.5 Communicate information on financial requirements and available financing arrangements according to <i>workplace policies and procedures</i> , and <i>relevant legislation</i> . |
| 3 Complete sale of pre-need products | 3.1 Confirm client decision.
3.2 Identify and access relevant <i>documentation</i> and |

ELEMENT	PERFORMANCE CRITERIA
and services.	agreements.
	3.3 Complete documentation according to workplace policies and procedures.
	3.4 Process financing and <i>non-cash transactions</i> according to workplace policies and procedures, and relevant legislation.
	3.5 Check cash transactions and tender change as required.
	3.6 Prepare and issue receipts and relevant documents to client.
	3.7 File and store documentation according to workplace policies and procedures.

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills, including clear and direct communication and active listening and questioning techniques, to convey information to clients, offer clients options and answer client questions
- literacy and numeracy skills to interpret written documentation, accurately complete required documentation and complete financial transactions
- computer literacy to complete documentation
- problem-solving skills to match client needs with products and services and suggest options.

Required knowledge

- range, benefits and features of pre-need funeral products and services
- reasons for pre-purchase of funeral products and services
- alternative information sources
- sales principles
- financial transaction procedures
- financing procedures
- broad working knowledge of relevant federal, state or territory, and local government legislation and regulations relating to consumer protection, privacy and the sale of funeral services
- workplace policies and procedures in relation to sales services
- social, religious and cultural differences and traditions.

Evidence Guide

EVIDENCE GUIDE

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Critical aspects for assessment Evidence of the following is essential:

EVIDENCE GUIDE

and evidence required to demonstrate competency in this unit

- ability to communicate with the client and correctly interpret the client's requirements
- ability to apply sales techniques in response to a range of different client situations
- underpinning product knowledge
- understanding of consumer liability issues
- selling different types of pre-need funeral and burial products and services on multiple occasions to ensure consistency of performance and ability to meet varying client needs.

Context of and specific resources for assessment

Assessment must ensure:

- demonstration of skills in an environment where client consultation can take place
- interaction with diverse clients to allow candidate to respond to a range of pre-need client requirements and requests
- access to relevant documentation, such as workplace pricing and financing options and product information.

Methods of assessment

A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:

- observation of candidate identifying a range of client needs using appropriate communication and interpersonal skills, applying product knowledge to provide accurate information about pre-need products and services, completing financial arrangements according to relevant legislation, and processing cash and non-cash transactions
- written or verbal questioning to assess knowledge and understanding of relevant policies and procedures with regard to providing pre-need sales services
- review of workplace documents completed by candidate
- review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate.

Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended,

EVIDENCE GUIDE

for example:

- SIFSL001A Sell funeral and burial products and services.

Employability skills embedded in this unit should be assessed holistically with other relevant units that make up the skill set or qualification and in the context of the job role.

Range Statement

RANGE STATEMENT

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Communication techniques may include:

- active questioning
- active listening
- negotiation skills
- appropriate choice and use of language
- non-verbal communication.

RANGE STATEMENT

Pre-need products and services may include:

- funeral arrangements
- embalming arrangements
- cremation arrangements
- burial arrangements
- coffins or caskets
- coffin or casket accessories
- burial plots
- mausoleum crypts
- headstones
- grave markers
- urns
- nameplates.

Other sources may include:

- past and present staff members
- relevant industry associations
- books, magazines, newspapers and other references
- internet.

Appropriate personnel may include:

- supervisor
- manager.

Product knowledge may include:

- features
- choices
- inclusions
- support service options
- price
- materials
- differences between products.

Client buying signals may include:

- nodding
- facial expression
- body language
- participation.

RANGE STATEMENT

Workplace policies and procedures may include:

- standard operating policies and procedures
- standards and certification requirements
- quality assurance procedures.

Relevant legislation, regulations and codes of practice may include:

- Fair Trading Act
- Funerals (Pre-paid Money) Act
- Consumer Credit Code
- Privacy Acts
- local government regulations
- financial institution requirements, including:
 - finance approval procedures
 - finance processing procedures
 - credit card approval procedures
 - credit card processing procedures
 - cheque acceptance procedures
 - cheque processing procedures.

Documentation may include:

- contracts of sale
- invoices
- receipts
- financing documentation.

Non-cash transactions may include:

- financing
- cheque
- credit card.

Unit Sector(s)

Sector

Funeral Services

Competency field

Competency field Sales