

Vulnerable Customers: Launch of a 2-part programme



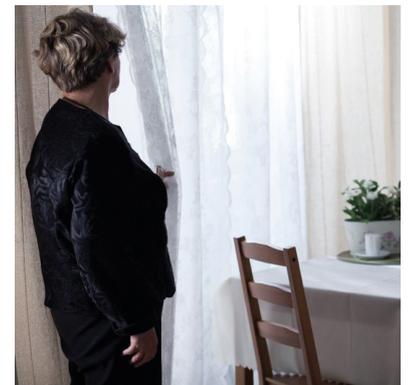
UNIQUE TWO-PART VULNERABLE CUSTOMER TRAINING PROGRAMME

DESIGNED TO GIVE YOUR BUSINESS ALL IT NEEDS TO BEST SERVE AND EQUIP YOUR OPERATIONAL TEAMS

We are delighted to launch a 2 part programme which is designed specially to give contact centres the tools they need to best serve their vulnerable customer base.

Call North West and SWCCF are collaborating with **TRUST**, a professional and exceptionally talented training provider whose experience and knowledge in this area of expertise are unrivalled to deliver a wide range key topics in a fully collaborate style which address:

- The identification of customers in vulnerable circumstance and making reasonable adjustments
- The wellbeing of staff interacting with vulnerable customers
- The development of policies relating to vulnerable customers.



2 GREAT PROGRAMME STREAMS

Programme 1: Contact Centre Leaders Programme

3 great sessions for Contact Centre Leaders whose teams are dealing directly with the customer.

Programme 2: Setting the Operational Framework for Vulnerability

For Leaders setting the strategic direction for managing vulnerability .



Programme 1 : Contact Centre Leaders Programme - 3 Sessions

Session 1: Recognising Vulnerability – How to recognise vulnerability within your customers

(Duration - 2 Hours, delivered by 2 experienced trainers)

This session begins by looking at how vulnerability can be defined – we examine a range of industry body definitions including those of the Financial Conduct Authority, OFCOM and OFGEM and consider how closely these definitions align to the attendee's organisational definitions or practices.

Next is a look at how a vulnerable circumstance may arise and the impact those circumstances may have on a consumer in their decision making, action taking and representing their views.

The session includes two practical exercises.

Objectives of the session

- **Gain** a heightened awareness
- **Recognise** vulnerability when you see it
- **Learn** to appreciate that vulnerability is complex and changeable

This session provides a cornerstone of understanding and is built upon during Session 2 Making Reasonable Adjustments.

Session 2: Making Reasonable Adjustments – how to implement reasonable adjustments to deliver fair outcomes to customers in vulnerable circumstances

(Duration - 2 Hours, delivered by 2 experienced trainers)

In this session we explore how a customer may interact with an organisation and how a vulnerable circumstance may be identified across several contact channels. We then move on to look at the Reasonable Adjustments that could be offered and how to determine which is the most appropriate option to better support each customer's needs.

We explore several models for handling contacts with customers in vulnerable circumstances to enable the delivery of fair outcomes.

We share some practical tools which can be adapted and tailored to each attendee's organisation, enabling them to assess and determine in a structured manner which is the best option for each customer.

Objectives of the session

- **Understand** what reasonable adjustments and how they can be made
- **Develop** your skills to select and implement solutions
- **Deliver** fair outcomes for your customers

This session builds upon knowledge and understanding gained in Session 1: Recognising Vulnerability.

Session 3: Case Study Workshop

(Duration - 2 Hours, delivered by 2 experienced trainers)

This Session has been designed to give delegates who have attended Sessions 1 and 2 a practical session to apply their newfound knowledge in a controlled environment.

During this Session, delegates work in teams to examine three real-life case studies from across a range of industries. The teams will seek to identify at what stage the organisation could have identified a vulnerable circumstance existed and then select the appropriate reasonable adjustments to the service delivered, which would have ensured a fair outcome for the customers concerned.

Programme 2: Setting the Operational Framework for Vulnerability

This programme of Sessions has been designed for organisational roles that lead and support the customer facing teams. These sessions are designed for Senior Managers and Executives including HR Teams and Policy teams.

Session 1: Why Vulnerability Matters

(Duration - 2 Hours, delivered by 2 experienced trainers)

This session enables senior leaders to understand what vulnerability is and what impact it can have upon the organisation which they lead with both customers and staff potentially affected.

During this session we

- **Understand** what vulnerable circumstances are and how they impact customers and staff
- **Discover** why Vulnerability matters
- **Learn** how adopting vulnerable friendly solutions can build revenues and brand advocacy

Explore how organisations can adjust to accommodate vulnerability within the customer base and employees

Session 2: Recognising vulnerability within your workforce

(Duration - 2 Hours, delivered by 2 experienced trainers)

This session has been designed for HR professionals and those managing employees.

During this session we

- **Identify** where and how the organisation is exposed to vulnerability
- **Appreciate** the impact that vulnerability can have on employees
- **Learn** how Reasonable adjustments can support employee's health and well being
- **Examine** the impact of Vulnerability Champions on the organisations' performance

Session 3: Having a vulnerable people's policy is essential and how to build one

(Duration 90 mins, delivered by 1 experienced trainer)

It's essential for every organisation to have a vulnerable people's policy. Whilst many regulators are now making this a requirement, this is not the only reason your organisation needs one. Having a policy will provide customer facing teams with clarity and enable them to deliver fair outcomes consistently.

If you do not currently have one, or yours was pulled together by one individual or has been gathering dust on the shelf ever since it was written, then this is the session for you.

During this 90-minute session, we share a framework that provides both structure and flexibility and will challenge the organisation to tackle the key questions. Our framework provides practical guidance on the steps to follow, and the considerations to make as the policy is created and implemented for your organisation as well as who should be involved

Booking Information

All sessions will be delivered via MS Teams and copies of the slides presented will be provided after the sessions.

Course Name	Session	June	July
Contact Centre Leaders Programme	Recognising Vulnerability	22nd (10am -12pm)	12th (10am - 12pm)
	Making Reasonable Adjustments	23rd (10am -12pm)	13th (10am - 12pm)
	Case Study Workshop	28th (10am - 12pm)	19th (10am - 12pm)

Course Name	Session	July	August
Setting The Operational Framework for Vulnerability	Why Vulnerability Matters	14th (10am -12pm)	10th (10am - 12pm)
	Recognising Vulnerability within your Workforce	20th (10am -12pm)	11th (10am - 12pm)
	Vulnerability Policy	23rd (10am - 12pm)	13th (10am - 12pm)

Course Name	Members rate	Non-members rate	
Contact Centre Leaders Programme	£300+VAT	£375+VAT	An additional 10% discount will be given for bookings to attend both courses.
Setting The Operational Framework for Vulnerability	£300+VAT	£375+VAT	



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