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Delivering a great Customer Experience to vulnerable customers

Great businesses can be relied upon to provide a consistent level of service that is inclusive of all their customers. How best do we achieve this when some of our customers might have more challenges in communicating and making informed decisions because they are vulnerable in some way? This interactive workshop will help Contact Centre agents be better able to recognise all types of vulnerability and be more flexible in their approach, enabling them to align with customers and meet their needs more effectively.

BENEFITS TO YOUR BUSINESS

- To be market leaders, not followers, when it comes to being a compassionate business that puts all customers at its centre.
- Being able to positively influence every Customer Experience with consistency of service thus increasing the likelihood of being a first choice for customers.
- Avoiding reputational damage where Contact Centre staff are ill equipped to manage calls from vulnerable customers who may not be able to make informed decisions, resulting in customer complaints and negative publicity.
- By providing comprehensive training alongside robust policies and procedures, staff will be equipped with greater confidence and skills when serving more vulnerable customers, thus boosting morale and ensuring the delivery of best practice every time.
- Increased assurance that regulatory obligations will be fulfilled through enhanced staff awareness of the critical importance of recognising potential vulnerabilities in customers and taking appropriate action.

WHO SHOULD ATTEND?

This course will be of benefit to all employees who are customer-facing, in particular those who may be in contact with higher levels of vulnerable customers due to their business operations.

LEARNING OUTCOMES

By the end of the workshop you will be able to:

- Identify and agree what might constitute a vulnerable customer and consider how we can identify them, appreciating that some vulnerabilities may not always be visible. Explore also how the term “vulnerable customer” itself is a complex, sensitive and often changeable area.
- Develop strategies and interventions that help us align ourselves better with each individual customer and learn how to modify our service in response to the range of different vulnerabilities.
- Develop increased awareness and sensitivity towards vulnerability, harnessing our Emotional Intelligence to provide a more empathic, tailored response to each individual customer.
- Embrace the needs of all customers by championing vulnerability back in the Contact Centre, furthering best practice across the business.



WORKSHOP OUTLINE

Explore and define what we mean by a “vulnerable customer”

At the outset of this workshop we explore what might constitute a vulnerable customer and identify how these individuals may find themselves more vulnerable in their transactions with our business. We also explore why vulnerability can be a complex, sensitive and changeable subject area and the need to maintain the rights and respects of each presenting individual.

Identify a vulnerable customer and the challenges this can present for them

In this session we focus on how to pick up on signals that might suggest we are in a vulnerable customer situation. We will look at the range and nature of these vulnerabilities and the challenges they can present both to the customer and to ourselves. We explore the agent's role in taking ownership of the call, identifying effective approaches to align ourselves with the customers and their situation.

Developing effective strategies to help deal with vulnerability

From initial greeting, establishing rapport and improving personalisation, we look at how we can give a more positive experience that ensures each of our customers feels like an individual. Learning how we can more effectively empathise by harnessing our Emotional Intelligence so we can relate to each customer as an individual every time.

Honing our listening and questioning skills

Utilising the skills of advanced listening and questioning are crucial to avoiding assumptions and to ensuring we convey clarity, trust and understanding in vulnerable customer situations. Focusing on honing our attentive and empathic listening skills, and our ability to anticipate, probe and clarify with effective questioning we can better understand the customers' needs and effectively tailor our responses.

Coaching and action planning to improve the Customer Experience

Generating ideas to improve our workplace policies and approach when dealing with vulnerable customers we will explore how we can better embrace vulnerability in all situations. Identifying participants' personal goals for development, we will consider how to utilise the coaching process to support our continuous improvement in this area.

