

Identifying and Responding to Vulnerable Customers

This half-day course is aimed at challenging assumptions and building confidence in how to identify, respond and support vulnerable customers. Through insight, shared experience and case studies the training will better equip customer-facing teams to deal with customer's diverse needs.

Every organisation has customers who are facing situations that make them vulnerable. How we interact with those customers can either improve or hinder their ability to access the products, services and support they need. During this course we explore ways to make a positive difference.

Delegates will have the opportunity to reflect, share good practices and participate in course activities and case study discussions.

Benefits to your organisation

- Trained staff can provide empathetic and personalised support, building trust with customers who may have unique needs or challenges
- Supportive interactions can lead to positive customer experiences and good outcomes
- Timely and proactive support reduces the likelihood of customer complaints and escalations
- Trained staff can identify and mitigate potential risks associated with vulnerable customers, reducing the likelihood of legal, regulatory and reputational issues
- Employees who feel equipped to provide support to vulnerable customers may experience increased job satisfaction, knowing they are making a positive impact

Learning outcomes

- Understand and identify the different and additional needs of customers experiencing vulnerability
- Build a resource of useful and appropriate questions and responses and know how and when to apply them
- Recognise a range of practical steps to support a customer experiencing vulnerability
- Understand the importance of signposting

Who should attend training

- Customer facing staff
- Claims handlers
- Complaints handlers
- Vulnerability Champions and leads
- Customer Service Team Leaders

Course Content

Identifying Vulnerability

- Understanding vulnerability
- Behaviours and characteristics of vulnerability
- Volunteered and detected disclosure

Responding to Vulnerability

- Recognising and addressing emotional needs
- Recognising and addressing practical needs
- The role of signposting

In summary

Investing in vulnerable customer training for staff not only aligns with ethical, legal and regulatory principles but also contributes to the overall success, reputation, and sustainability of the organisation in the long run.