

About the company

Hastings Insurance Services Ltd is a UK personal lines insurance broker, providing car, bike, van and home insurance. With over 3,400 colleagues servicing more than 2.8 million live customer policies, they are heavily regulated by the Financial Conduct Authority.



The Challenge

With regulation guidance shifting heavily towards treating vulnerable customers fairly, Hastings Direct were aware of the gap in their practices and support.



Following an internal recruitment process, a new Vulnerable Customer Escalation Team was created. The main responsibilities of the team are to receive customers identified as potentially vulnerable at front-line level and to address any specific needs they may have. This also involves helping them achieve their desired outcome with the organisation and signposting as appropriate.

With this new team, it was essential every member received vulnerable customer training.

The Solution

We delivered a 1-day 'Supporting Vulnerable Customer' training course with 7 team members at their offices in Bexhill-on-Sea.

The training course covered the four main elements of vulnerability good practice with a strong focus of the Financial Conduct Authority regulatory guidance:



1. Understanding Vulnerability
2. Recognising Vulnerability
3. Identifying Needs
4. Adapting to Needs

Taking into account the client's requirements, we provided activities and discussions throughout the day that focused on encouraging disclosure, gaining a deeper understanding of the client's vulnerable circumstances and signposting.



Results



The training was professionally and expertly delivered, covering all the key elements the team required to carry out their new roles, and for the organisation to be compliant.

It has been important to the organisation that all the team members received the training as they are now all on the same level of knowledge and skill to support their customer base.



"The training was very clear, easy to understand and provide the correct amount of detail to be able to retain the information provided"

"Very informative and engaging"

"A really good use of my time, thank you very much"

Can Helen Pettifer Training Help you?

Customer Service Consultancy and Training, specialising in Vulnerable Customers. Helen Pettifer Training provides in-house and on-line training, training manuals and eBooks. As well as compliance support, documentation and policy consultation.

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TRAINING

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