

Milestone 1

Foundation.

- ✓ Leadership structure review
 - ✓ Policy reviews
 - ✓ Executive team survey
 - ✓ Training material review
 - ✓ Customer persona reviews
- ✓ Understand customer base and vulnerability needs
 - ✓ Tailored colleague surveys

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Milestone 3

Colleagues.

- ✓ Results of colleague survey
 - ✓ Establish gaps and solutions
- ✓ Delivery of training and support materials
- ✓ Colleague performance objectives review
 - ✓ Wellbeing/EDI support review
- ✓ Ongoing support for vulnerability team

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Milestone 5

Embedding.

- ✓ Define data capture requirements
- ✓ Support with creation of tailored reporting
 - ✓ Testing of QA results

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Milestone 2

Customer.

- ✓ Customer journeys risk assessment
- ✓ Nature of customer calls/contact
 - ✓ Customer insight review
 - ✓ Framework reviews
 - ✓ Existing data review
- ✓ Review of current reporting
- ✓ Review of current standards

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Milestone 4

Elevate.

- ✓ Embedding learning
 - ✓ Case studies and scenarios
- ✓ Knowledge sharing and supporting best practice
 - ✓ Call listening
- ✓ Attendance at team meetings
- ✓ Identifying any additional training requirements

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