

# Recognising Vulnerability



## and Making Reasonable Adjustments

**Our Modular Workshops teach you how to recognise and respect vulnerable customers and how to support your staff as they engage with them**

Designed and run by Elaine Lee with trainer Jacqui Workman, our workshops will empower you and your teams to consider the needs, attitudes, and emotions of all your customers as they travel the customer journey.

**reynolds busby lee**

Bringing the voice of your customers into your boardroom and working practices

# Recognise, Respect & Readjust

47% of the UK adult population display one or more characteristics of vulnerability\*

40% of customers in vulnerable circumstances are not being recognised\*\*



Organisations that don't cater for the specific needs of vulnerable customers may inadvertently be making difficult circumstances worse. They're also at risk of breaching the Equality Act and regulator codes of practice and regulations and requirements e.g. the FCA's Consumer Duty or the Fundraising Regulators Treating Donors Fairly.

With our training around vulnerable customers, you and your staff will learn how to recognise and respect customers in challenging circumstances and then how to readjust your products and services to better support their needs enabling you to build a more satisfied customer base.



\*Source Financial Lives Survey 2022, FCA

\*\*Source Mortgage Solutions July 2022

# Modular Training

Our training options offer the opportunity to build sessions tailored to your organisation

When working with new clients we typically start with a short piece of consultancy with detailed discussions about your own organisational approach to vulnerability and understanding how your Voice of the Customer (VoC) programme could be utilised to improve identification of customers in vulnerable circumstances. We'll consider any prior training alongside your policies, procedures and protocols – so they can be incorporated into your tailored sessions reassuring your staff of your commitment to treat all customers or supporters fairly.



# Module 1:

## Recognising Vulnerability and Making Reasonable Adjustments to support your Customers

- Gain a heightened awareness
- Recognise vulnerability when you see it
- Learn to appreciate that vulnerability is complex and changeable
- Develop your skills
- Experience vulnerable circumstance first-hand
- Understand what reasonable adjustments can be made
- Learn about the impact on your customer service / donor services team
- Take away a practical e-book
- Deliver fair outcomes for your customers / supporters / donors

We begin by considering ‘what is vulnerability?’ and how your regulator (if you have one) and a range of others define vulnerable circumstances. We then uncover the scale and scope of vulnerability within the UK and how that relates to your customer base. We consider how vulnerability can arise and how the state of vulnerability for a customer can change over their lifetime with your organisation and how and when you can identify those changes in circumstance through your contact channels and VoC programme.

*I liked that there wasn't an over reliance on PowerPoint - it was used as an aid and didn't become the focus of the sessions. Very engaging presenters and lots of information to take away and think about.*

Kathryn Griffiths-Day, Land Registry

We then move on to look at Reasonable Adjustments - what they are and how to determine which are the most appropriate options to better support each individual customer's needs. We explore several models for handling contact with customers in vulnerable circumstances to enable consistency of approach and the delivery of fair outcomes. We'll share some practical tools which will enable front-line teams to take a structured and consistent approach when engaging with each customer.

*The training was highly engaging and thought provoking. It was well received by our teams who scored the day at 4.9 out of 5! The workshop left us with a useful set of tools that will allow us to better respond to our supporters, whatever their personal circumstances. We're delighted with the outcomes.*

David Mason, Information and Fundraising Compliance Manager  
The Salvation Army United Kingdom and Ireland Territory



# Module 2:

## Case Study Workshop

This workshop has been designed for those who have previously attended Module 1

- **Apply knowledge from Module 1**
- **Examine real case studies**
- **Identify where vulnerable circumstances exist**
- **Determine appropriate Reasonable Adjustments**

Our immensely popular Case Study Workshops are designed for those who have previously attended Module 1 and are a practical session to apply newfound knowledge in a controlled environment. Delegates work in teams to examine three real-life case studies from either your own organisation (of your choosing) or from across a range of industries. The teams seek to identify at which stage the organisation could have identified a vulnerable circumstance existed and then select the appropriate reasonable adjustments to the service delivery, to ensure a fair outcome is delivered to the customers concerned.

To embed the knowledge gained and understanding of how to apply Reasonable Adjustments, these workshops can be run as a one-off or can become regular and ongoing - the choice is yours! Clients who have completed these sessions are delighted with the results from both the session and in practical applications after the event.

*A really great session, engaging, lots of interaction and opportunities. The real-life case studies really bring the scenarios to life and help you think about what you would do going forward if a similar situation arose.*

Workshop Delegate, March 2022

# Module 3:

## Recognising Vulnerability within your Workforce and Making Reasonable Adjustments to support your Staff and Volunteers

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

The newest addition to our training solutions considers the needs of your teams handling contacts with customers in vulnerable circumstances. We've noted that whilst organisations are focussed on customers, the support needs of their teams may be overlooked. During this internally focussed session we uncover how to assess how well your team members are coping with sometimes a tidal wave of contacts from struggling customers. We also uncover tools and solutions to better support team members and colleagues, ensuring our training provides practical, real-world solutions.

*Our large cross-team group, who work on the phone and in person, benefitted hugely from the training day, sharing experiences and gaining valuable tips about how to help, and to help themselves too.*

Fiona Magor, Rethink Mental Illness

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Contact us now to discuss how we can build bespoke sessions for you



Elaine and Jacqui have been championing the needs of vulnerable customers since 2009. They co-chaired the Data & Marketing Association's Vulnerable Taskforce and co-authored its vulnerable consumer training materials with training courses offered by the IDM. Elaine also worked with the CloF (Chartered Institute of Fundraising) to create and then update their guidance for fundraisers, *Treating Donors Fairly*.

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