

Care Initiative



Caring for the Vulnerable Trainers notes

Written and produced for the DM foundation

To be used in conjunction with Caring for the vulnerable training materials written by Sureya Landini (2015)

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Introduction

These trainer notes have been developed by Elaine Lee of ReynoldsBusbyLee Limited to provide guidance and support for any trainer using the training materials entitled 'Care Initiative – Caring for the Vulnerable' which have been developed by Sureya Landini of Blue Donkey Limited,

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The training slides have been developed to prompt and guide the trainer, rather than being prescriptive. In addition these notes seek to increase the trainers understanding behind the development of the materials, recognising a variety of training styles. The supporting notes aim to enable the trainer to adapt each unique training session whilst keeping the focus on the core objectives. Trainer tips will be provided throughout for Audience Connection Techniques (ACTs) to maximise audience understanding through participation.

The materials have been built into five units. The units build upon the learning and discussions developed in the prior units and therefore the training should be delivered with each unit following consecutively.

These training materials follow the concept of meeting the neighbours. This design reflects that people living within vulnerable circumstances live as neighbours amongst all communities within the UK. Currently within UK businesses there is a common misconception that vulnerability affects a small minority of UK consumers. However, the reality is very different with at least one in four (25%) of the population affected at any one time at the time of writing. Vulnerability within our communities is a growing problem and in order to ensure that we change our behaviours to ensure that as businesses we better serve all consumers, we must first tackle some of the misconceptions and myths in this area. These materials will help you to explore the reality of the situation within the UK.

These training materials will introduce the participants to a wide range of vulnerabilities, some of which will be explored in a little detail to provide an improved high level of understanding. The training materials are not intended to diagnose a particular vulnerability, instead they aim to increase agent awareness that vulnerabilities exist within our communities and through recognition, adjustments can be made to the standard level of service offered to ensure inclusivity and improved customer experience.

Key Note: The training materials discuss people living with vulnerable circumstances who may not wish to be labelled as vulnerable. The author recognises that it is the circumstances that create the vulnerability rather than the person. The term 'vulnerable adults' is used here for simplicity and clarity.



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1. Overview of the training units

Unit 1: Objectives of the training and background

This unit outlines the objectives of the training and provides background information as to why it has been necessary to create the materials. During the unit, the trainer will need to foster an open and honest atmosphere to ensure engagement and participation from all attendees.

Unit 2: Exploring vulnerability

This unit has been designed to plant the seeds of enhanced understanding and needs and begin to question and explore the service levels currently being delivered to these consumers. This must be tackled in a non-judgmental way – participants should be encouraged to be open and honest

- What does it look like
- Understand how I am currently servicing these customers
- Aim to expose current practice failings without being judgemental

The unit introduces the vulnerable community through the deliberate use of caricatures rather than real people and faces. These conceptual slides provide a detachment from emotional connection with any individuals to prevent any emotions creating barriers to learning. By keeping the section at a conceptual level, the attendees should be more open to understanding the ideas and thoughts discussed without attaching personal feelings at this stage.

The unit introduces some critical thinking and the interactive slides aim to get discussions going.

The section on paradigm shifting will challenge the attendees to think beyond their first impressions and information presented at face value. It demonstrates how gathering additional information can critically change a view or opinion.

Aim to keep a level of detachment in these discussions and avoid sharing of personal stories and experiences at this stage of the training. If emotions and personal connections are allowed to enter the training environment at this point, the concepts being discussed will be less well understood.

Unit 3: Service needs and expectations

This unit explores the environmental factors in which our telephone conversations are taking place.

- Understand how messages are transmitted within conversations
- What can we establish over the phone



Review case studies of our characters – we learn more about them and begin to explore their needs. The attendees should be encouraged to make and discuss suggestions regarding how the service offering can be adjusted to better suit the customer needs.

Through the discussions you will determine that the needs overlap and the heightened sensitivities and new skills can be utilised frequently – this isn't as complicated as may have first been feared.

Unit 4: What can WE do

In this unit we start to pull together the answers to the questions and suggestions raised in the prior units. It is also in this unit that the participants begin to realise that their actions and words can make a difference and take responsibility for having a positive impact. The unit reminds the participants that the session is concerning real people who live within their immediate neighbourhoods.

This unit carries solutions and presents practical and simple options that the attendees can utilise.

One of the key steps here is to encourage the attendees to look beyond first impressions and gather additional information to allow better informed selection of appropriate solutions for each individual. Reminding participants of the impact of the paradigm shift story within unit 2 had upon their reactions, empathy and desires to help can be a helpful aid.

Within this unit a practical session using the 'flash cards' can be run towards the end of the unit to reinforce learning through participation. During such a session attendees should be encouraged to utilise and implement the steps discussed in this section to determine how they improve the service delivered to each individual. The individuals within the flash cards should be introduced as "my neighbour" to reinforce the understanding that living within all communities and neighbourhoods will be customers who are living with vulnerability – at face value we might not realise that there is a vulnerability and that once we become aware we can do something positive to improve the service delivered which will benefit the relationship between business and customer.

Unit 5: Reflections

This unit is for reflective learning – the attendees should actively participate here and demonstrate the learning you expect to see.

This unit should actively engage the attendees and position them to think about the service they will deliver in the future on returning to their desks. Aim to avoid any reflection on historical behaviour and conversations.

The section also reinforces the benefits to the customer, the employee and the organisation by making changes to the service delivered to customers with vulnerability.

Participants should be encouraged to identify and share with the group three changes they will make as a result of this training.



Audience connection techniques (ACTs)

In order to engage the participants with the materials to understand its relevance in the real world to them, their neighbours, customers and telephone conversation it may be helpful to employ Audience Connection Techniques (ACTs).

The following four ACTs can be deployed by the trainer when relevant for each group.

1) Participation: show of hands

- For example - how many of you believe you have handled a call with a vulnerable adult?

2) Visualisation of a situation or outcome

Ask the participants to visualise a particular situation or outcome. Participants should aim to put themselves in someone else's position and view the world from a different stand point. They are likely to need additional information to be able to understand and anticipate the needs of a vulnerable adult. The information provided in the flash cards can be used for these occasions.

- For example using a flash card - consider you are a vulnerable adult with autism. when you get frustrated you find writing things down or expressing yourself clearly very difficult. Ask participants to explain;
 - how they would feel?
 - what they would want to happen?

3) Focus on the relevance of the topic to your audience

- Help participants to see the relevance of the topic to their individual roles
- Take real examples and work them through in the group

4) Think-Pair-Share

This technique is known to bolster audience confidence in responding, leading to better ideas being generated from multiple brains and through discussion being reviewed and refined.

- Ask the group to consider a question or scenario
- Ask the individuals to think of their own answers
- Next pair the participants up and ask them to discuss their individual answers and agree a solution
- Finally ask the pairs to share their thoughts and solution with the wider group



The use of ACTs are suggested at various points within the following training guidance notes. Their use is indicated by the symbol shown to the left.



During the training it may be useful to prompt the group to consider the neighbours introduced in unit 2 and how the group may understand their needs and requirements and how those needs might be best addressed. It will not always be necessary to discuss these thoughts - moments of quiet personal reflection can be helpful.

Participants should leave the training session feeling energised, determined and capable of delivering an improved customer experience to vulnerable adults within our communities when interacting with them over the telephone during their working day.



2. Symbols key

The following symbols will appear throughout these trainers notes to provide the trainer with suggestions and prompts to aid the training sessions to run smoothly. Each training session will be different from the last and will be dependent on the participants within the room and their energy and appetite for the subject. These prompts will remind the trainer of opportunities to dynamically change the session to suit the group being trained.



Stop and think

Is your audience engaged? Can you draw them in using examples? The notes will prompt with suggestions to keep your group engaged or prompt with materials to encourage reflection.



Light bulb

Try using additional materials at this point within the training for example flash cards to prompt discussions if the session is becoming flat or energy levels are low



Fact

Share a fact to reinforce your message. The reality of vulnerability is that it is often underestimated and / or misunderstood. The inclusion of facts from recognised authorities will build agent understanding and confidence in the need for this training.



Audience Connection Technique (ACT)

Suggestions for audience participation. ACTs can be used to engage the training participants into the subject. ACTs can also boost energy levels which can be useful for training sessions run post lunch break or on a Friday afternoon for example.



Further reading

If you, or the agents being trained, would like to know more about research referenced within the training slide, further reading materials are suggested. See the reference appendix for more details.



3. Trainer guidance



When preparing for each session

- Beware emotion! Emotion can affect a participant's ability to learn as they become distracted by their emotion and lose focus on the training materials
- Consider your training group
 - is there anyone within the group who may be considered to be a vulnerable adult or is caring for a vulnerable adult
 - how do the participants within this group typically respond best to training
 - are they extrovert or introvert – how will you ensure all participants learn and the group is not dominated by individuals
- It is natural for someone who is feeling vulnerable to become defensive. This can prevent the participant from listening to the trainer or the wider group in group discussion sections. They may become introspective – reflecting on their own experiences and feelings.
- Some of the ideas and suggestions in this session may conflict with current processes and practices (slides 48 onwards). Aim to discuss this with the management team and seek approval for changes to current processes / practices

Unit 1: Objectives of the training and background



Slide 1: Opening slide

- How are you going to introduce this topic?
- How are you going to get your audience engage?
- How are you going to grab audience attention from the beginning?

Slide 2: Objectives

- Walk the participants through what you expect they will learn by completing this training session
 - Clarify what they will learn and why it is important to their role / job



- Ask for a show of hands – how many of you can remember handling a call with a vulnerable person?



Slide 3: Unit header



- ❑ Share some headline statistics with the group or ask the group if they have any suggestions for some of these facts
 - ❑ 1 in 4 suffer with a neurotic mental health condition (e.g. depression, Anxiety or personality disorder)
 - ❑ 1 in 50 have psychotic conditions e.g. schizophrenia, bipolar
 - ❑ 1/3 of people aged 50-64 have a disability,
 - ❑ one in 3 people over 65 will develop dementia, two third of those people will be women,
 - ❑ by 2021 there will be 1million people in the UK who will have dementia

Slide 4: Background

- ❑ Explain why the training is thought to be necessary
 - ❑ Explain there is a growing appetite for understanding and acceptance of mental health issues through celebrity recognition (e.g. Stephen Fry)
 - ❑ UK Prime Minister's challenge to create dementia friendly society and communities across Britain
- ❑ Disarm potential conflict or resistance at this stage by using inclusive terminology "we" not "you"
- ❑ Try and avoid a teacher / pupil style

Slide 5: DMA White paper and survey

- ❑ DMA project team founded 2011 in response to Alzheimer's Society annual report – genuine desire to make things better
- ❑ No preventative guidelines existed so created some!



- ❑ DMA White paper
- ❑ Aging population stats
- ❑ Business Disability forum
- ❑ Surveyed real contact centres – staff and supervisors

Slides 6-11: Our survey tells us

- ❑ Having surveyed contact centre staff it's clear they don't always know when they are speaking to a vulnerable person, that the teams feel that training has been an issue and that they don't always feel supported by management.



- ❑ Slide 8: In an ideal world everyone is treated as an individual and that we should adjust and adapt our conversations for each contact. DMA's concept of one-one-millions. Our hope is by raising the standards for telephone conversations held with vulnerable adults, we will raise the standard for all consumers. The intention is to provide an inclusive approach - rather than differentiation or exclusion



- ❑ why is do agents feel unsupported by management? is it because agents perception of vulnerability is narrow - deaf / blind / customer says something?
- ❑ Why might agents be unaware?
- ❑ How might the participants react to these survey results?



- ❑ Survey the room before revealing the results of each or some of the questions
- ❑ Discuss with the participants how these stats relate to their expectations - is this what they would expect / have guessed?
- ❑ Ask participants if the results cause them any anxiety, concern or worry that following the training they will be under additional pressure and expectations from management
- ❑ Slide 9: Ask participants how easy do they think it would be to provide training to help vulnerable adults. Ask them to consider what does that training need to address and how best could that be delivered?



Unit 2: Exploring vulnerability

Slide 12: Unit header

Slides 13-17 Definitions

- These slides look at various definitions of vulnerability
- A vulnerability may be **permanent** such as dementia **or transitory** following a bereavement

- Multiple definitions are given deliberately- they will expose that there is not one single and unanimously accepted definition and that there is no right or wrong answer here.
- The slides present views from academics, local councils and charity practitioners working with those considered to be vulnerable adults - those who have studied this area or are working daily in this arena. We'd expect to respect their opinions - do we?
- Slide 15: Brenkert's view - Brenkert is an academic who has studied the concept of vulnerability. He is a well published author on this subject. His key message is that everyone is susceptible to exploitation although some are more susceptible than others



- George G Brenkert, Marketing Ethics (Foundations of Business Ethics), Wiley-Blackwell, (2008)



- This is a reflective section of the training - once the definitions have been viewed and considered ask participants to share their current practices and to identify any potential weaknesses in those practices.
- It is anticipated that participants will ask questions here - capture those questions perhaps on a flip chart or post-it notes but don't try to resolve them yet



- Definitions will help with understanding and identity. Need to ensure that this improved understanding does not lead to being over protective and suggestions that marketing to vulnerable consumers is inappropriate.
- Avoid participants becoming judgemental - instead aim to open minds to other perceptions and consideration of other opinions
- These discussions may prompt personal stories being discussed / considered - aim to stop this carefully as personal emotions can become a barrier to learning.



- ❑ Remind participants that vulnerable people still need products and services and are entitled to choice and customer service as anyone else. All consumers are people who deserve dignity including vulnerable adults.
- ❑ If the group becomes judgemental and over protective ask them to consider how the vulnerable can access the world if we become over protective and close them out? Consider if the vulnerable adult does not have a support network to help them cope. Get the group to start to think about (but not necessarily share aloud) what they would want if they were vulnerable or were caring for a vulnerable family member.

Slide 18: Meet the neighbours section header

- ❑ This section aims to increase awareness within participants that we are all surrounded by people living in vulnerable circumstances within our neighbourhoods as our neighbours

Slides 19-20 Meet the neighbours / a typical neighbourhood

- ❑ Through our day to day lives and interactions with our own neighbours we may not immediately recognise a vulnerable adult e.g. someone with early on-set dementia or a new mother with post-natal depression
- ❑ Need to avoid an **us and them** mentality as we may have vulnerabilities within the room
- ❑ In the slides that follow we'd like the participants to view their existing neighbourhoods from a new perspective and begin to see things differently - we'll take it step by step
- ❑ Slide 20: A conservative estimate is that 1 in 4 (25%) of us could be considered to be a vulnerable adult. The map slide serves only to remind participants that the vulnerable characters being introduced live within a general neighbourhood, they are not isolated from the rest of society. We may not have recognised that our own neighbours have vulnerabilities. This slide may prompt that realisation.

Slides 21-26 This is....

- ❑ Each slide shows a character and one piece of information about that person
- ❑ Imagine you have just moved house and thrown a housewarming party to meet your new neighbours - we typically remember one or two facts about our new neighbours e.g. Peter lives at number 12 and lives with his mother, Janet lives at number 16 and has 3 dogs, Andy has a Ferrari.
- ❑ We then layer on more information as we get to know someone and we are proposing to follow this same strategy within this training
- ❑ Guide participants through each slide without dwelling too long.
- ❑ Slide 25: Take care to avoid / stamp out any signs of racism or discussions around immigration.



- Need to control sentiment and emotion within this section. Emotion can become a barrier to learning with participants focussing on a particular issue and closing their minds to alternative ideas
- Prepare how you will handle the situation if a participant wants / tries to share a personal experience which will carry emotion. You will need to ensure that the participant remains engaged and an objective stance when considering the information being shared

Slide 27: What does vulnerability look or sound like?

- This seek to open the discussion with participants sharing their ideas of what vulnerabilities may look and / or sound like
- Expect the group to be drawn by the image and discuss anger or volatility - remind participants that we may not currently always be aware we are talking to a vulnerable adult. Prompt a wider consideration for more subtle, less obvious indications that a vulnerability may be present

Slide 28: volatility and anger

- This slide is likely to challenge common practice and understanding within contact centre environments. Typically centres will have policies on handling volatility and anger and often encourage agents to discontinue calls where anger and frustration are expressed
- Here we aim to look at anger in a different way and from a different perspective
- If we became aware that some traits that we have been taught to understand are threatening, **may not** actually be intentionally abusive or threatening, we may instead manage the calls / contacts differently
- The slide seeks to open participants minds to there being other factors that we **don't currently** recognise or understand as being vulnerabilities



- Can agents understand that there is a sense of achievement to be gained from turning anger into satisfaction?
- Can agents therefore understand that the same sense of achievement can be gained from a conversation with a vulnerable adult presenting anger or volatility and where the call is closed to the satisfaction and reassurance of the customer whilst delivering company objectives? Can the agents see this as a goal?

Slide 29: National cultures

- The slide shares an academic view of national culture. This is deliberate to diffuse emotion from this potential volatile subject area. It is perceived to be more



difficult to argue with an academic view (as it is assumed that reason and thought have formulated the position based on a statistically reliable source of data, as opposed to an emotional, gut reaction based on personal experience).

- ❑ it is imperative to avoid any discussions around national divide to ensure the session is not derailed from its purpose



- ❑ Hofstede, G. (2009) Geert Hofstede, Culture's Consequences: International Differences in Work-Related Values. Beverly Hills CA: Sage Publications, (1980)
- ❑ Hofstede, G. Cultures and Organizations: Software of the Mind HarperCollins, (1994)

Slide 30: I can't help you!

- ❑ This poem prompts consideration of how a different approach may help Fatma.
- ❑ Fatma has been selected for this review as she appears to have multiple vulnerabilities - English may not be her first language, she may have cultural differences and she may have hearing loss

Slides 31- 32: Paradigm shifts

- ❑ These slides aim present a shift in critical thinking
- ❑ Aim - all participants understand the concept of a paradigm shift - a sudden and unexpected change which takes the participant to a significantly different destination that they had expected



- ❑ Participants may feel a little anxious or nervous at this point -as they understand that we are about to challenge their typical thought processes and operating procedures, but are not sure how. Consider how you will handle any concerns / nerves?

Slides 33-36: Stephen R Covey's paradigm shift

- ❑ Stephen R Covey's work is well published and is widely recognised amongst academics and the business world
- ❑ Let the story play slide by slide



- ❑ Ask the group to imagine they are sitting in the carriage of the train where this scenario plays out
- ❑ After each slide ask the group to share their thoughts and suggestions regarding their initial (gut) reactions and potential



- What would you want to do if you were on that train?
- How would you react if you were the person sitting next to the children's father (Covey)? Would you say anything?
- What emotions are you experiencing as we encounter this experience?
- As the reveal is made in slide 35 observe the reactions of the participants - are any of the reactions extreme - if so explore this with the group collectively
- Repeat the above questions and establish any changes in thinking, emotions, reactions
- Ask the group to try and identify when their view changed and what was the catalyst for that change (expected answer = slide 35 when the father informs Covey that his wife had died an hour ago).
- Considering our assumptions at the start of the story - after the wife's death was revealed would you expect to take actions that you had not anticipated at the start
- Draw out from the group that the key here is that knowledge of the additional information (that was not immediately apparent) allows a different decision / judgement to be made



- Ensure that the group are clear that the possession of knowledge beyond face value is key, before you move on to the subsequent units



- If the group is struggling with the concept of additional information can be critical to determining a customer experience you can utilise other examples that challenge our preconceptions
- Utilise stories of famous people which are in the public domain e.g. Frank Bruno's mental health, Robin William's depression, Mickey Rooney's financial and verbal abuse from family members which left him with an estimated estate value of just \$18,000 on his death
- The key message here is an individual's public persona may be hiding a more private / truer picture of an individual and their needs



- [Stephen R. Covey](#), The 7 Habits of Highly Effective People, Simon & Schuster Ltd, (2004)



Slide 37: Critical thinking and assumptions

- ❑ This slide is to be used to prompt initial reactions and asks the participants to begin to get to know themselves and their current critical thinking - how do they feel, react etc now?
- ❑ Participants are likely to begin to question themselves and their prior behaviours and actions. It is important to keep the mood positive and focussed on learning to change future behaviours and actions.
- ❑ The key question asked here - HOW DO WE KNOW - may leave the group feeling a little nervous and unsure. The subsequent sections aim to reassure.

Slide 38: We don't and can't know

- ❑ This slide seeks to reassure participants that they are not expected to know everything and that the key to success is to question own assumptions and prior practice with a greater knowledge would we make the same decisions and take the same actions.



- ❑ This is the end of unit 2 which has engaged emotions and reactions. Consider whether the participants would benefit from a short break here.



Unit 3: Service needs and expectations

Slide 39: Unit header

- ❑ This unit builds on shared reflective practice and is the start of an ongoing journey of continuous development

Slide 40: Service needs and expectations

- ❑ Unit 3 seeks to address the questions raised on this slide
- ❑ Need to consider environmental factors and to be realistic - What can we realistically establish during a telephone conversation without any visual cues

Slide 41: Our neighbours

- ❑ Quick reminder of the characters introduced in unit 2



- ❑ After a break it is important to re-establish participation in the training session.
- ❑ Ask the participants if they can name each character and the one fact we learned about each
 - ❑ Peter was diagnosed with schizophrenia at 18
 - ❑ Aisling is suffering with post-natal depression
 - ❑ Frank has dementia and can get very angry
 - ❑ Lucy has autism and can find it hard to relate
 - ❑ Fatma finds it difficult to explain things in English
 - ❑ Janet has recently been bereaved and is grieving

Slides 42-47: Case studies

- ❑ The information contained within these case studies has come from the NHS website
- ❑ Walk through the case studies identified in turn
- ❑ Focus on trying to establish the service needs and expectations of the each individual - ask the group to share thoughts and ideas - discuss and agree which are key



- ❑ Write the groups ideas up on a flip chart and pin to a wall to retain for reference throughout the remainder of the session
- ❑ Prompt consideration for different ways to handle the circumstances outlined in the case study - invite differences of opinion to stimulate discussion and consideration of alternative view points



- Some of the ideas presented in slides 48 and 49 may conflict with current operational practice / agreed processes for example asking a contact made via an outbound call if now is a convenient time to talk.
- Participants may raise objections as to why these questions and techniques should not be utilised (e.g. if gives them an excuse to end a call without allowing me to pitch)
- Consider how you will handle this - you may have discussed this with managers before the session and have news to share of changes in policy / practice

Slide 48: Meeting needs

- Practical tips on changes to behaviours and style are provided here. Run through them with the group and discuss how easily they can be adapted into the normal run of business
- Aim to demonstrate practical, simple changes are easy to apply. Explore the potential impact that applying these techniques may deliver.
- Ask the participants to consider from the position of the caller - stand in their shoes for a moment



- Ask for a show of hands - have any of the participants used these techniques before
- Are some techniques more familiar than others (discover through show of hands etc)

Slide 49: Recognising needs

- How can we establish the needs of the caller? When this is done it is easier to address those needs
- This slide offers some practical suggestions of how each individual customers / callers' needs might be recognised . The slide offers non-judgemental tactics
- Explore with the group which of these are likely to be most valuable to them
- Ask the group how they will remember these and take them back to their desks



Unit 4: What can WE do

Slide 50: Unit header

- ❑ Practical tools are provided in these slides with memorable acronyms to help participants remember and consider the caller
- ❑ The slides provide techniques and tools to discuss and evaluate. They show how practical solutions / changes **can** be applied

Slide 51: What can WE do

- ❑ Discuss the suggestions shown with the group
 - ❑ Can the participant identify the value in each suggestion?
 - ❑ Can they see themselves utilising these techniques?
 - ❑ How will the participants remember to utilise the techniques when back at their desks?

Slide 52: We listen

- ❑ **Pitch:** avoid speaking with too high a pitch this can create sense of urgency or alarm, making contacts panic or trigger stress reactions. This could be highly distressing if it's your bank calling
- ❑ **Tone:** avoid a monotone voice (can be triggered by reading a script from a screen or repetitive activity). Monotone expresses boredom - instead vary the tone in your voice to engage your contact and express interest and care
- ❑ **Pace:** be aware of your pace - talking too quickly may lose your audience and cause confusion or mis-trust as talking too quickly can be perceived to be covering up a scam. Remember when you are nervous or excited our pace automatically increase - be aware and remember to breathe and sound calm
- ❑ **Clarity:** avoid the use of acronyms or internal terminology - consider will the customer understand this?
- ❑ **Repetition:** great aid to gauging understanding - tell them what you are going to tell them, tell them, then tell them what you have told them and get them to tell you in their words what you have told them
- ❑ **Projection:** posture can influence your voice, tone and clarity. Projection of your voice into the mouthpiece will display confidence and engender trust

Slide 53: We CARE

- ❑ Useful acronym CARE to provide participants with a reminder checklist for completing dialogue with contacts
- ❑ Reinforces the message of the Care Initiative
- ❑ Responsible companies and organisations do care about its customers and staff members

Slide 54: PACE yourself

- ❑ Another acronym to remind participants how to establish understanding within the contact regarding an agreement or conversation made over the telephone



Slide 55: Decision making matrix

- ❑ Distribute copies of the decision making matrix to the group
- ❑ The decision making matrix. A simple tool for the participants to use having established understanding and needs. The matrix offers practical suggestions for how to proceed once need and understandings have been identified.



- ❑ Discuss with the group
 - ❑ How comfortable are the participants with using the suggested prompts, actions
 - ❑ Can the group identify any useful additions to the matrix

Slide 56:let's KISS

- ❑ A final acronym to remind participants in a light hearted way to keep it simple and succinct



- ❑ Practice and allow the participants to utilise and assess the new tools they have reviewed and discussed in the prior slides.
- ❑ Explore if the tools help? Which are the preferred tools and why
- ❑ Use ACT - Think-Pair-Share (TPS) - put the group into pairs and provide each pair with a flash card. Allocate 5 minutes to this task - Ask each pair to discuss and agree which of the newly discussed tools they will use to establish the potential needs of the contact on their flash card. Also outline how they might address those needs. After the allocated time ask the pairs to share their thinking with the whole group
- ❑ The exercise is expected to demonstrate that potential needs and solutions will be shared across the vulnerabilities and that the new skills are likely to be utilised in a real environment frequently.
- ❑ The exercise should also demonstrate that participants are not expected to diagnose a condition - rather that a heightened sense of awareness will alert the participant to potential needs and solutions to be considered.



- ❑ This is the end of unit 4 which may have been an interactive and mentally tiring unit. Consider whether the participants would benefit from a short break here.



Unit 5: Reflections

Slide 57: Unit header

- ❑ This section allows the participants time to reflect on the new tools and ideas they have discussed and evaluated
- ❑ Participants should begin to determine which tools they will aim to use in their roles when returning to their desks

Slide 58: How do we know if we are succeeding?

- ❑ This slide identifies that with change, we expect results to improve.
- ❑ Ask the group to identify how those improvements may manifest themselves within their organisation and how will they be tracked? How can these improvements be shared?
- ❑ Ask each participant to note 3 things that they will do differently as a result of this training? How will they implement these changes and ensure that they are consistently applied?



- ❑ To boost commitment to implement changes when returning to their desks - ask the participants to write down their 3 changes and then share them aloud with the group

Slides 59-60: Organisational goals

- ❑ Aim to get the participants to understand the business benefits of making the changes
- ❑ Explore and discuss what the impact of change will be to all stakeholders - the business, its customers and its staff? Where are the gains to be made for each party?
- ❑ Avoid any anticipated negativity of the organisation towards change "*It's all well and good but things won't change here*". Explain that the organisation has agreed to the training and therefore has an expectation of changes in processes and practices to benefit all customers.
- ❑ Aim to empower participants to take the desired changes and implement them within their roles



- ❑ Ask the group how they will ensure that they effect the desired changes
- ❑ Determine how they will determine whether they are maintaining progress after an initial change (not letting behaviour slide back to old habits / standards)



Slide 61: Kolb's how to learn from experience'

- This slide introduces a theoretical piece by Kolb which explains that the best learning comes from a continuous process. This session should be seen as the start of a new continuous learning experience.
- The learning experience seeks to be collective and non-judgmental seeking to identify learning and opportunities for change and reinforcement in the future
- Ask the participants to outline how they can get involved in a continuous learning process at their organisation



- Identify and capture suggestions to be shared with management

Slide 62: why should we adopt ethical and socially responsible practices?

- This slide reinforces the purpose of the change
- Aim to get the group to see beyond their individual roles and to see the benefit of collective ownership and responsibility to change
- Why is it required, what benefits will it bring and to whom?
- Why is it important to return to work and practice this new approach, learning?
- What steps will the participants take to make sure change is delivered?



- Revisit the ideas captured from slides 60 and 61

Slide 63: A final thought

- Share a final thought - the poem
- Remind the participants that these changes will affect **real people in real life** situations

Slide 64: Closing slide

- If we accept the principle of people belonging to people we can begin to view our contacts differently and change the ways in which we transact or interact with them



- Suggest the group considers how they would feel if one of 'their' loved ones (mother, father, grandparent, child) was treated unfairly. Remind the group that



every contact belongs to another person and is someone else's mother, father, grandparent or child.

End the session:

- Remind them to **implement their changes** immediately on returning to their desks - not tomorrow or next week but **now**
- Ask the group to complete feedback forms before they leave
- Thank the group for their participation and close the session

Follow-up:

- Ensure any ideas, concerns or thoughts raised by the group are shared with the management team
- Follow-up with the management team to hear how successfully the training has been implemented and any changes identified by the business as a result of this training.