Foundations for Supporting Customers Experiencing Vulnerability



THE CUSTOMER EXPERIENCE EXPERTS

Customer vulnerability is becoming increasingly common - but recognising and responding with confidence isn't always easy.

For frontline teams, these situations can be complex. Customers may not clearly express their circumstances and responding appropriately requires a balance of empathy, clear communication and sound judgement.

This workshop builds practical, foundational capability to recognise when a customer may need additional support, adapt communication appropriately and respond within role boundaries.

After completing this workshop participants will be able to:

- recognise cues that may signify customer vulnerability during interactions
- adjust communication to respond with empathy, clarity and care
- navigate challenging situations with confidence while maintaining appropriate boundaries
- recognise when escalation is required and take appropriate action.

Real-life scenarios bring our training programs to life

At CSBA we believe the most effective training programs don't just impart information; they provide opportunities to apply that knowledge to real-life situations. That's why we incorporate learning activities that focus on putting new knowledge into practice, to bring to life the skills and techniques discussed in the workshop.

We co-design aspects of this course with you, to align with your organisation's existing protocols for managing customers experiencing vulnrability.

*Put the **person** before the **process***

INTENDED AUDIENCE
Frontline staff who may encounter customers experiencing vulnerability

DELIVERY MODE
In person (flexibility for virtual equivalent)

DURATION
3 hour introductory course

GROUP SIZE
Maximum 15 participants

Aim

To provide foundational skills to recognise and respond to customer vulnerability, including how it presents in interactions, how to adapt communication effectively, and when to escalate based on your role and limitations.

Course content

- Understanding the nature of customer vulnerability and why it matters
- Identifying cues and behaviours of customers who may need additional support
- Communicating with care
- Applying the guardrails: Confident support that aligns with your organisation's processes
- Challenging assumptions and habits.

Learning outcomes

By the end of the workshop participants will:

- recognise how vulnerability may present in customer interactions, including behaviours that may mask distress, frustration or uncertainty
- apply communication techniques that demonstrate empathy, clarity and flexibility, adapting their approach to better support customers experiencing vulnerability
- have practiced applying guardrails to avoid over-investing or over-committing when supporting vulnerable customers, including knowing when and how to escalate appropriately in accordance with your organisation's protocols
- reflect on their current assumptions and commit to practical change.

CONTACT

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We provide a 360-degree view and work with you to improve your customers' experience.

