## Appendix 4

## Staff process for dealing with unacceptable customer actions.

**Customer Contact by telephone/mobile**

Open a new or existing CRM record or on your **services relevant system**. Where an existing record indicates that the customer is known to present with unacceptable action, follow the guidance below. Please remember to make notes of your interaction on the system that you use, in addition to logging a low-level incident.

Customer is abusive/aggressive to staff over the phone.

**No** → Handle enquiry following service guidelines.

**Yes**

Attempt to defuse the situation, by repeating back to the customer what their issue is to demonstrate you are listening, and ask them to confirm your understanding, do not respond in kind, remain calm, but be firm and polite when responding. Advise the customer that they should not speak to you in this manner, and should they continue, you will terminate the call, once the call has concluded remember to complete a low level incident form and advise your line manager of the situation.

The customer telephones again but continues to be abusive or aggressive or the behaviour escalates.

Advise the customer that their actions are unacceptable, and if they want you to help them, they need to explain in a polite way what the issue is. If the behaviour continues advise them that you will terminate the call if their behaviour continues, if it does, terminate the call and then log either a low-level incident form or a Health and Safety Incident dependant on the nature of the call, discuss with your line manager if you are unsure how best to proceed. The determination team may decide to write to the customer regarding their actions and if applicable, any restrictions that are going to be put into place.

The customer continues to telephone and continues to display unacceptable actions or the actions escalate. Report this to your manager and log the contact on the customer's account.

The customer telephones again but their actions are acceptable - continue to engage with the customer as normal. Log the contact as normal on the customer's account

Advise the customer that their actions are not acceptable and that the matter will be escalated, advise them that you are going to terminate the call and then do so. Speak with your line manager about the incident.

If not completed previously, a H&S investigation will commence, a determination will be made as to if the customer needs to be placed on the CIR and a risk assessment may be carried out. You and your manager will be involved in the investigation.

**The Determination Team will advise customer of outcome of determination if appropriate.**