Document control form

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Protocol for Dealing with Customers in the Reception and Interview Rooms at the Exchange

Reducing possible triggers for customers who are distressed or upset, or who have the potential to behave in violent or aggressive ways

1. Maximum waiting time for a customer who arrives without an appointment to be no more than 10 minutes before they are attended to (see section 3 below for options re: attending to customers)

    - Reception staff and customer should be advised promptly if the service area cannot provide a service/response within 10 minutes of initial contact from customer.

2. If a customer arrives in an agitated state, then the aim should be to respond quickly to reduce risk of the situation escalating. If someone arrives in such a state and has been waiting for more than 5 minutes, then Reception staff to phone the relevant team to alert the manager or the staff member deputising in the team manager's absence.

3. Attending to customers promptly - options are:

    - Deal with the customer's needs/wants directly (face to face, by phone, letter, etc.).
    - Refer the customer to another designated member of staff. If the person that the customer has asked for is not available, ask them to return at another time, but only if the relevant staff will be available then.
    - Advise the customer that the service area cannot meet their needs/wants at the time of their visit to the Exchange and explain to them why, and, if there are any suitable alternatives, then tell them what those alternatives are.

4. Staff across teams to work together to deal appropriately with the customer:

    - Customers should not to be referred to a specific team without agreeing this with the team first, or unless the team runs a duty rota.
    - If staff on reception ask for help in dealing with a customer, the service area to discuss all possible options with them, including a team member speaking to the customer directly by telephone, for example.
    - If the customer is asked to return at another time, make sure it is when the relevant staff are available to see them.

"Think Safe"

5. Assess the risks and consider the safety aspects (use the **AEPS** model).

Note: Definitions of "low", "medium" and "high" will be flexible and will depend on the individual member of staff (in terms of their level of experience in dealing with agitated customers, their knowledge of that particular customer, etc.) :

- Share relevant and timely information with relevant colleagues among both Reception and Children's Services staff, including alerting colleagues if a customer is expected to come to the Exchange in an agitated state.

- Decide on most appropriate person to deal with the enquiry. (e.g. decision-maker, team colleague or reception staff).
- Promote safer use of building by restricting size of the "entourage" accompanying customer for certain types of enquiry. Young people coming in for finance/grants to be advised of a "1 plus 1" policy (i.e. can only be accompanied by one other friend, and any other friends will be asked to remain outside of Exchange Building).
- Select safest area for dealing with customer (in the open area, behind the reception desk, in an interview room, etc.).
- Agree a management strategy between the team member and reception staff. Share any additions to the **Emergency Contact List** with reception staff and **plan an escape route**, plus other actions as appropriate (e.g. asking reception staff to patrol outside the interview room, asking another team colleague to sit in on interview, etc.). Remember to alter the strategy if your assessment of the level of risk changes.
- Other areas of risk include customers accessing restricted areas of the building – be prepared to challenge tailgaters, and ask all visitors without ID to go directly to reception area.

Keeping self, colleagues and other people safe

6. Some measures that may be taken to handle situations with difficult customers:

    - Use de-escalation techniques as appropriate.
    - Call for assistance (reception staff, other CSD staff in vicinity, other team members, managers)
    - Temporary withdrawal of service
    - External support (e.g. Police)

7. Emergency Contacts

    - Share urgent information with relevant emergency contracts (see the separate Emergency Contact List)
    - Keep it brief & factual. Don't supply judgements and opinions
    - Staff need to know:
        - ✓ Who to inform
        - ✓ What the problem is
        - ✓ Name of the customer being difficult
        - ✓ Likely risk
        - ✓ Help and support that is needed by staff dealing with the customer

8. Post incident actions

    - Keep log/complete Accident & Near Miss form
    - Manager to call debrief meeting within 1 week where incident assessed as needing this, to capture lessons to be learned and to revise management strategy for the individual customer.