Lifetime
learning & development

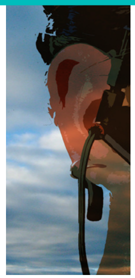
Training Courses for the Financial Sector

# Care of the Bereaved Customer

## Skillful customer handling after a death

On average a newly bereaved person will need to contact 26 different companies to explain about the death and to sort out insurance, pensions, bills, bank accounts.
**How does your customer care shine out?**

# Care of the Bereaved Customer



*The emotional trauma of becoming a widow can be overwhelming, but the bureaucratic nightmare that often follows is an unexpected extra burden.*

Radio 4 woman's hour 'the bureaucracy of widowhood' 1st May 2007

*Many women leave all the financial aspects of the marriage to their husband, so it comes as a great shock to them when they have to sit down and go through all of the household bills and financial affairs.*

Merrywidow the guide

When someone dies, the bereaved family is thrown into a bewildering maze of financial administration. A grieving person will be asked to go through a lot of bureaucratic details which enable the company to fill in necessary forms but may trigger painful and difficult feelings for the customer. From the company's perspective, for example, a date of birth and date of death are simple numbers but for the customer they represent the huge pain of the recent loss of a loved one. The human response they receive from their contact with a financial organisation makes an enormous difference to their whole experience of grief. People will talk to others about both good and bad experiences of a company's response to their bereavement and the reputation for being a company who cares about its customers may be severely compromised.

In a hugely competitive industry, financial companies rely on their call staff to maintain good relationships with customers to ensure continued custom and good reputation. However, both call staff and managers often feel less than confident in talking with the bereaved. Even the most skilled communicators are affected by the impact of dealing regularly with the distress of grieving customers.

## Who is it for?

Lifetime offers training for all staff involved with customer service from call centre workers to senior management.

## Benefits to the company:

- Exceed your customer expectations for care and efficiency
- Be ahead of your competitors in recognising the importance of this aspect of customer care
- Enhance your company's reputation among the financial sector and in the public domain
- Confident leadership of skilled staff teams
- Development and retention of experienced skilled staff

## Learning outcomes

Delegates will

- Understand the needs of newly bereaved people
- Learn a contemporary grief theory model
- Use appropriate language about death, bereavement and grief
- Increase empathic communication skills
- Understand how their own response to grief affects customers
- Be more confident in dealing with bereavement
- Understand how they are impacted by customer distress
- Learn strategies for self-care
- Develop an action plan to put learning into practice

## Course aims

'Care of the Bereaved Customer' courses aim to increase confidence and skill in dealing with bereaved customers, leading to retention and wellbeing of both staff and customers.

## Training style

All courses are practical and experiential, involving delegates in a wide range of learning activities, discussions and group work. The atmosphere is informal and encouraging of involvement. Creative activities are included to inspire individual development and learning.

## Group size

Group size is flexible according to the needs of the company. We work on a ratio of one facilitator to 12 delegates and two facilitators for larger groups. Our groups allow for high participation and intensity of input with small group exercises and peer feedback to enhance learning.

## Resources

All courses include handouts and resources for further exploration.

## Investment

Please contact us with your needs so that we can offer you the most cost effective package for your company. Our fees are based on the number of facilitators needed and include pre course discussion with training organiser plus handouts and materials. VAT and travel expenses will also be included.

## For further information and bookings

Please contact Jo McAndrews at Lifetime to discuss your thoughts and requirements. Courses are tailored to the needs of your company and can be designed to address specific learning needs and issues.

**Jo McAndrews** is an experienced training consultant and qualified psychotherapist. Over the last sixteen years she has worked with a wide range of learners, designing, developing and delivering inspiring and satisfying courses. She works with teams and individuals as part of whole organisations. She has experience in facilitation, supervision and coaching and brings an empowering and thoughtful approach to those she works with.

Jo has a warm and open style which invites people to participate in their own learning and development. She is skilled at communicating with a wide range of people from different backgrounds and levels of experience and looks forward working in partnership with you and your company.

More information on:
**www.lifetime.org.uk**

**Other related training courses from Lifetime:**

» Managing relationships at work
- developing skills for managers

» Team building and communication
- maximizing team resources and functioning

**For a full list of courses please visit our website**
**Bespoke training also available**

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