

Vulnerability Mentoring Programme

6-month programme to increase
organisational knowledge and practices on
vulnerable customers



Vulnerability Mentoring Programme

Why?

Since the publication of the Financial Conduct Authority's Guidance on the Fair Treatment of Vulnerable Customers, I have been approached by many organisations unsure of what the guidance means for them in practice.

With this in mind, I have created a 6-month programme exploring several of the key elements highlighted in the guidance.

When?

The programme consists of 6 monthly 3-hour meetings.

Dates and times to be confirmed.

Where?

Each meeting will be hosted virtually on Zoom.

What?

Each meeting will include the following:

- ~ A masterclass on monthly topic
- ~ Open and collaborative discussions
- ~ Activity/task
- ~ Resources to support the topic

Whilst it's advisable to attend all the meetings, I know this may not always be possible.

Each Masterclass will be recorded and sent, with the activities and tasks, to anyone who is unable to attend that meeting.

Who?

This programme is ideal for people working with and creating inclusive service provision for vulnerable customers in their organisation.

This includes roles within Customer Experience, Vulnerable Customers and Risk and Compliance.

Each mentoring programme will have no more than 8 members.

How much?

The investment in this programme is £1,200.

This includes all resources, worksheets, and activities plus a 1-hour 1-2-1 session with me.

Programme Agenda

Month One – Understanding Client Base

Focusing on the FCA guidance's first pillar 'Understanding Customer's Needs', this month we will be doing a deep dive into what personal circumstances customers may be experiencing and how this impacts them.

- ~ Personal circumstances
- ~ Impacts
- ~ Nature and scale
- ~ Risks and consequences
- ~ Frequency vs high risk

Month Two – Understanding Organisational Responsibilities

This month we explore the obligations and responsibilities firms must actively consider in order to treat vulnerable customers fairly.

- ~ Legal
- ~ Regulatory
- ~ Moral/Ethical/Social
- ~ Colleagues
- ~ Policies, practices, and processes

Month Three – Understanding Colleagues Roles & Responsibilities

This month our focus is on the roles and responsibilities of employees and how to embed the fair treatment of vulnerable customers across the workforce.

- ~ Job tasks, roles, and responsibilities
- ~ Recruiting for vulnerability
- ~ Purpose and value
- ~ Building a specialist team

Programme Agenda

Month Four – Understanding Needs & Support

This month we examine the importance of understanding, recognising, and addressing the needs of vulnerable customers to mitigate harm and/or negative impacts and experiences.

- ~ Disclosure
- ~ Identification
- ~ Emotional vs Transactional
- ~ Support – Internal and External
- ~ Resources

Month Five – Understanding Organisational Culture

In month five our focus will be on creating a culture where the fair treatment of vulnerable customers is embedded throughout the firm.

- ~ Values
- ~ Symbols and practices
- ~ Congruency and consistency
- ~ Leadership
- ~ Developing an organisational vulnerability mindset

Month Six – Understanding Skills and Capabilities

In our final month, we spend time understanding the importance of skilling the workplace to recognise and respond to a range of characteristics and vulnerability.

- ~ Skills, capabilities, and confidence
- ~ Training programmes
- ~ Mentoring programmes
- ~ Community involvement
- ~ Developing an individual vulnerability mindset

Interested in joining the programme?

If you would like to join this Vulnerability Mentoring Programme or have any questions please email me at

helen@helenpettifer.com