

# Managing unacceptable behaviour from customers

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We are committed to providing high-quality customer service to everyone we deal with. We aim to do so in a fair, accessible and professional manner.

## Introduction

On occasions, unacceptable customer behaviour can affect the service that we provide to customers or can cause offence or upset to our staff. In instances where this occurs, we reserve the right to manage contact with that customer to protect our staff and maintain an effective service.

The aim of this policy is to help us to deal with unacceptable customer behaviour consistently and fairly. It lets staff and customers know what we consider to be unacceptable behaviour, and it sets out actions we may take to deal with such behaviour and who can authorise the actions.

When making decisions about appropriate action, the interests of the customer will be balanced against the effects that their behaviour is having on our staff, other service users and the efficient use of resources. Where a customer has a particular communication need, we will also consider the individual needs of that customer before deciding the most appropriate way to deal with the matter.

## What behaviour is unacceptable?

For the purposes of this policy, unacceptable behaviour is defined as:

- behaviour or language (whether verbal or written) that we consider may cause staff to feel intimidated, offended, threatened or abused
- communication that we consider to be unreasonably demanding, or unreasonably persistent in its frequency, type and nature

The above definitions may apply separately or jointly to a particular matter.

## What action we will take?

In most instances when we consider that someone's behaviour is unreasonable, where appropriate, we will explain why and ask them to change it. We will also warn them that if the behaviour continues, we will take action to restrict their contact with us. Where the behaviour is so extreme that it threatens the safety or welfare of our staff, we may report the matter to the police and/or consider taking legal action. In such cases, we may not give any prior warning of any action

that we are about to take.

When deciding what action we will take, we will take into account the circumstances of the customer to ensure that we are acting fairly and appropriately. Any action that we take will be evidence-based and proportionate. We will not take any such action lightly, and any action taken would be authorised by a senior manager. We may take any or all of the following steps.

## **Step 1 – Warning**

Where circumstances permit, we will tell the customer why we consider their behaviour to be unacceptable and ask them to change their behaviour. We may also give the customer a warning that if their behaviour or actions continue, we may need to apply restrictions on their contact.

## **Step 2 – Restrictions**

If any warning is ignored or if the customer continues to behave in an unacceptable manner, examples of some of the options that we may consider are: arranging contact to take place with a specified member of staff, restricting contact to a particular form, frequency and/or length, and terminating all contact. Other suitable options may be considered in light of the customer's behaviour and/or the circumstances of the matter.

In cases where we decide to terminate all contact, future correspondence will be read and filed without any acknowledgement or further action, unless we consider that it contains material of new information. Where any of this behaviour is over the telephone, we may inform the customer that we are not continuing with the call and terminate the call.

In cases where we decide to restrict access, we will usually write to tell the customer why we consider that their behaviour is unacceptable. We will give details of any earlier warning(s) about their conduct, what action we are taking, its planned duration, who has taken the decision and what the restriction means. We will also inform the customer of their right to ask for a review of this decision if they disagree with it. Details of the restriction will be logged onto our database, and all staff will be made aware of the restriction.

New issues brought by customers who come under this policy will be treated on their merits. We will consider whether any restrictions previously applied are still appropriate.

## **Who is authorised to impose a restriction on contact?**

We will never take a decision to restrict contact lightly. To reflect this, only senior staff can approve restrictions under this policy.

If we consider that we have to limit contact channels, only those staff at manager Grade five or above can make such decisions. For example, Head of Investment or Engagement.

Where we consider that the situation is so serious that we need to impose a permanent restriction, so that there is no further contact on any matter with a customer, such a decision can be made only at a Grade six or above level. For example, Directors of Nations and Areas.

If a customer disagrees with our decision to restrict contact, they should state why they disagree with the decision and provide full reasons as to why we should lift the restriction(s). A member of staff at Grade six or above, who was not previously involved with the original decision, will then review the matter, and their decision will be final.

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