Meeting your 50+ customer: a provider approach

This example of the approach they use has been provided by an employability programme provider, specialising in working with unemployed people aged 50 and over.

We know that to some degree all our customers are going to be nervous and unsure about what is going to happen and what the outcomes will be. So the first interaction and impression they gain is crucial to how the rest of their journey progresses.

Before meeting a customer for the first time we will have usually:

- received a direct referral from the customer who is responding to our service promotion or word of mouth recommendation,
- met them briefly at an outreach event
- received a referral via another organisation.

In all cases we prefer to have direct contact with the customer to arrange an interview time. This also provides an opportunity to:

- obtain the basic information we need on the customer
- make sure they know who they are going to meet and where the meeting will be
- have had the opportunity of putting them at their ease and starting to build a rapport
- ensure that they know we are looking forward to meeting them and reassure them that we will do our best to help them.

Generally, as with those customers who have come through word of mouth, all customers referred to us already know something about us and have been reassured of our competence. This is because I spend a lot of my time building up good relationships with other providers.

First impressions
We are acutely aware of all the verbal and non-verbal signals a customer is projecting. We always try to use encouraging behaviour, mirroring theirs where appropriate, to start the process of putting them at ease. We introduce ourselves and make certain we use their correct name.

When we meet our potential customers we aim to establish an even playing field. We take our cues from the customer and show we respect their point of view. Before we start the meeting and discuss their needs or what we can do to help we try to make them comfortable by:

- greeting them and shaking hands and introducing ourselves (very important to the 50+ age group)
- offering refreshments

- engaging in general conversation (i.e. the weather / how easy it was to find us).

For people who seem very fraught and worried we use a distraction tactic such as a tour of the premises to get them talking and starting to relax (our building has local historical value and many customers remember playing in the adjacent park or visiting it when it was the town museum).

Our welcome pack includes a questionnaire which asks the customer to give us feedback on how they felt they were treated. We use the feedback to improve our approach.

The people who come to our service do so on a voluntary basis so it is important that we ensure they understand that they have a choice about whether to use our service or not. The onus is on us to give them the information they need to make an informed decision.

Engagement meeting

The first meeting ideally lasts an hour. However, we have to be flexible as this meeting is designed to allow us to begin to get to know the customer and their story as well as provide information and answer questions. It sometimes extends beyond an hour if the customer starts to open up.

At the end of the hour we:

- ensure that the customer understands what our service offers
- check where they are on their journey back to work (or other, if work is not their primary goal) as this will be important in the next stages/choices of routes/signposting
- ask the customer to fill out our engagement paperwork, explaining why we are asking for the information
- make the next appointment or agree the next action with the customer, or our follow-up
- seek permission to put the customer’s information on our database.