

Task 9:

Treating all customers with equality and as individuals

To complete this task you will need to carry out research into the way the Equality Act relates to the way you deal with customers, and into the different types of customers you might need to deal with. It is important to understand that every customer is an individual and deserves to have their specific needs met, wherever that is possible within your organisation's service culture.

When completing this task, you will:

- research the Equality Act and suggest examples of discrimination
- analyse two case studies to decide if they are examples of discrimination
- explain how the Equality Act affects your organisation's service culture
- analyse how failing to treat customers as individuals will affect your organisation
- look at areas in your workplace where improvements could be made
- provide examples of how you deliver personalised customer service that fulfils the requirements of the Equality Act.

Key terms

Core values – the basic features of how an organisation goes about its work, and the practices the organisation follows every day in everything they do. For example, BMW's core values are 'Integrity, Respect, Responsibility, Growth'.

Equality laws – these are laws that try to ensure everyone is treated fairly and equally. At the time of printing, the Equality Act 2010 is the main law that serves to legally protect people from discrimination as customers. It replaced previous anti-discrimination laws with a single Act, making the law easier to understand, and strengthening protection in some situations. The Act sets out the different ways in which it's unlawful to treat someone. Before the Equality Act 2010 came into force there were several pieces of legislation to cover discrimination, including the following:

- Sex Discrimination Act 1975
- Race Relations Act 1976
- Disability Discrimination Act 1995

Service culture – a customer-centric approach to activities, in which customer needs are put first. Employees ensure customers have a positive experience. For example, the service culture of Four Seasons Hotels Ltd is that 'In all our interactions with our guests, customers, business associates and colleagues, we seek to deal with others as we would have them deal with us.'

Discrimination

The prejudicial treatment or of a person, racial group, minor based on category rather than excluding or restricting membership the grounds of race, sex,

Task 9:

Treating all customers with equality and as individuals

Relation to the standards

In this task you will be investigating how to meet individual customer needs so that everyone is treated with equal consideration.

As part of this task you will be working towards demonstrating that you have the following skills, knowledge or behaviour:

Knowledge:

By completing this task you will work towards showing that you know the appropriate legislation that affect your business, and how to apply it when delivering customer service.

Skills:

By completing this task you will demonstrate personal organisation skills in managing your workload and planning the completion of these tasks to meet your deadlines.

Behaviours:

By completing this task you will work towards showing that you can:

- recognise and respond to individual needs to provide a personalised customer service experience
- behave in a way that upholds the core values and service culture of the organisation.

Task 9:

Treating all customers with equality and as individuals

Preparatory activities

1. Research the Equality Act and summarise the key points in a few sentences. Explain how it affects the way that all customers are treated.



Task 9:

Treating all customers with equality and as individuals

3. Read and complete the following case studies.

Case study 1

Paul Martin is a full-time carer for his disabled sister, Caroline. At the weekend he is a regular customer of a local nightclub. On his birthday he visits the nightclub with Caroline. They are refused entry because the doorman says that the club's policy is to turn away individuals who are considered to be bad for the nightclub's image.

Who would have a claim for discrimination against the nightclub?

Tick your answer.

- a. Paul
- b. Caroline
- c. Both
- d. Neither

Give reasons for your answer.



Task 9:

Treating all customers with equality and as individuals

Case study 2

Georgia Edjali works as a teaching assistant in a primary school. Her husband, Arthur, is a solicitor. They have a mortgage on their house, based on their joint income. Arthur dies from a sudden illness, and Georgia has to sell the house, as she cannot afford the mortgage repayments.

She applies to a building society for a mortgage to buy a smaller property, but is refused it, as the building society says that their policy is to not lend to widows or widowers.

What factors could the building society reasonably take into account when deciding whether to offer Georgia a mortgage?

Explain whether Georgia is being discriminated against.



Task 9:

Treating all customers with equality and as individuals

Knowledge application

Explain the relationship between the Equality Act and your organisation's own core values and service culture. Look back to **Task 1** if you need to remind yourself of your organisation's core values and service culture.

Explain the potential impact on both you and your organisation if customers are not treated as individuals.

Task 9:

Treating all customers with equality and as individuals

Consider your organisation, and what areas and situations the Equality Act should affect in terms of how customers and employees are treated. Are equality and diversity laws being followed as effectively as they could be? Complete the table below, using the blank rows to fill in any additional areas in your workplace where diversity needs to be considered.

Area	Characteristics of customers who may be affected	Current situation	Potential improvements
Public areas (eg reception)			
Published information (eg website, brochures, sales literature, etc)			
Catering facilities (eg staff canteen)			
Toilet facilities			

Task 9:

Treating all customers with equality and as individuals

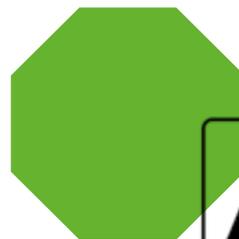
Discuss your findings from the previous table with the person responsible for equality and diversity in your organisation. Record the key points of the discussion along with any action points, and ask your colleague to sign and date the record below as a witness testimony.

Signed

Date

Name

Position

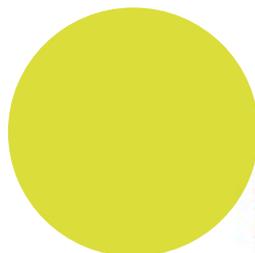


Task 9:

Treating all customers with equality and as individuals

Think of an example of a time when you provided a personalised experience to a customer with particular individual needs. Describe what you did differently from normal, and how this recognised and responded to the customer's needs.

Explain how you behaved in a way that upheld the core values and service culture of your organisation, giving specific examples.



Task 9:

Treating all customers with equality and as individuals

Now think of an occasion when your first impression of a customer was wrong and you did not correctly identify their specific needs. Describe what happened, and what you would do differently the next time you are faced with a similar situation.



Task 9:

Treating all customers with equality and as individuals

Learner reflection

Complete the learner reflection detailing what you have learnt from carrying out the task, how you will make use of your learning in your work and which skills you still need to develop.

Learner reflection

Mentor/trainer/employer feedback

Learner signature:

Date:

Mentor/trainer/employer signature:

Date: