

Expected customer service

- ❑ **Greet and treat clients with the same respect as anyone else.** Remember the **8 Code of Conduct principles? Acknowledge it!**
- ❑ Give people adequate time and attention. **Some people may need more of your time.** Be welcoming to women, elderly persons, Indigenous Peoples, persons with disabilities etc.
- ❑ **Communicate clearly and in a language that the client understands**
- ❑ **Always display available posters and brochures** explaining fees/costs, processes and hotlines for people to get help. **Always display your company identification** e.g. ID/badge.
- ❑ **Be patient** when you are sharing information. Some people are first-time clients.
- ❑ **Address every question** - be mindful of people's digital financial literacy levels and **provide appropriate solutions**
- ❑ **Guide people** through how to use services/solve problems – multiple times if necessary – rather than doing it for them
- ❑ **Never disclose a customer's personal data** to unauthorized personnel, such as contact number and balance information
- ❑ **Assure people about the security of their accounts.** Do advocate for keeping PIN codes and passwords secret - this can prevent fraud
- ❑ **Educate people about the benefits of financial services.** Inform them about other products that might add value for them (loans, insurance etc)
- ❑ **Redirect people** if you don't know the answer. **Always refer people if they disclose sensitive issues** to you (see below). **Do be discreet and do not pry.**

Referrals cheat sheet:

Advanced technical help	Issues with the project	Someone is in danger
<ul style="list-style-type: none"> ✓ Next level escalation for technical problem: _____ ✓ Customer protection service centre (not related to _____ [organization] project or staff conduct): _____ 	<ul style="list-style-type: none"> ✓ Call _____ [organization] for any other issue raised: _____ Always remember to report issues, incl sensitive issues [fraud/harm] in your customer protection logbook and call: _____ 	<ul style="list-style-type: none"> ✓ Call _____ [organization] for any sensitive issue raised: _____ ✓ In case of immediate danger: Police: _____ Health services: _____ []: _____ Always report the issue.

8 Principles of Code of Conduct

- 1 I AM RESPECTFUL TO ALL MY CLIENTS
- 2 I AM PATIENT AND FAIR
- 3 I DO NOT EXPLOIT OR ABUSE MY CLIENTS
- 4 I FOLLOW THE RULES AND LAWS
- 5 I KEEP MY CLIENTS' PRIVATE INFORMATION SAFE
- 6 I SAY NO TO BRIBES AND CORRUPTION
- 7 I AM RESPONSIBLE AND TRANSPARENT
- 8 I SPEAK UP IF SOMETHING IS WRONG

[Sign initials] I promise to follow these rules to ensure everyone is safe and treated fairly.

Watch the video here: <https://vimeo.com/309084196>

! If you see something, say something! Immediately report fraud, bribes & other illegal activities, any forms of violence, including sexual exploitation and abuse. No matter who is involved.

Call _____

