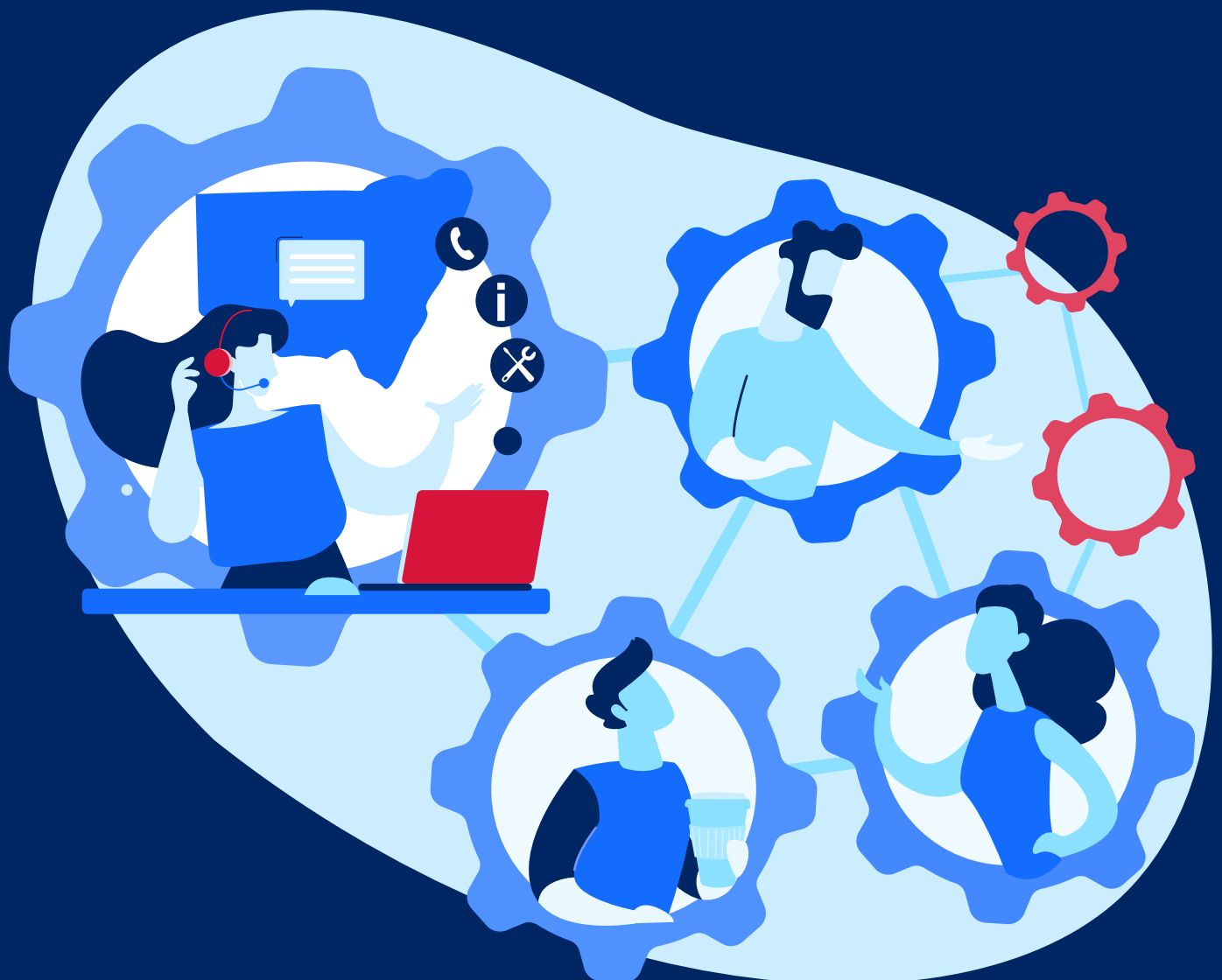


Taking action to help customers in distress

A Best Practice Guide for NSW Government
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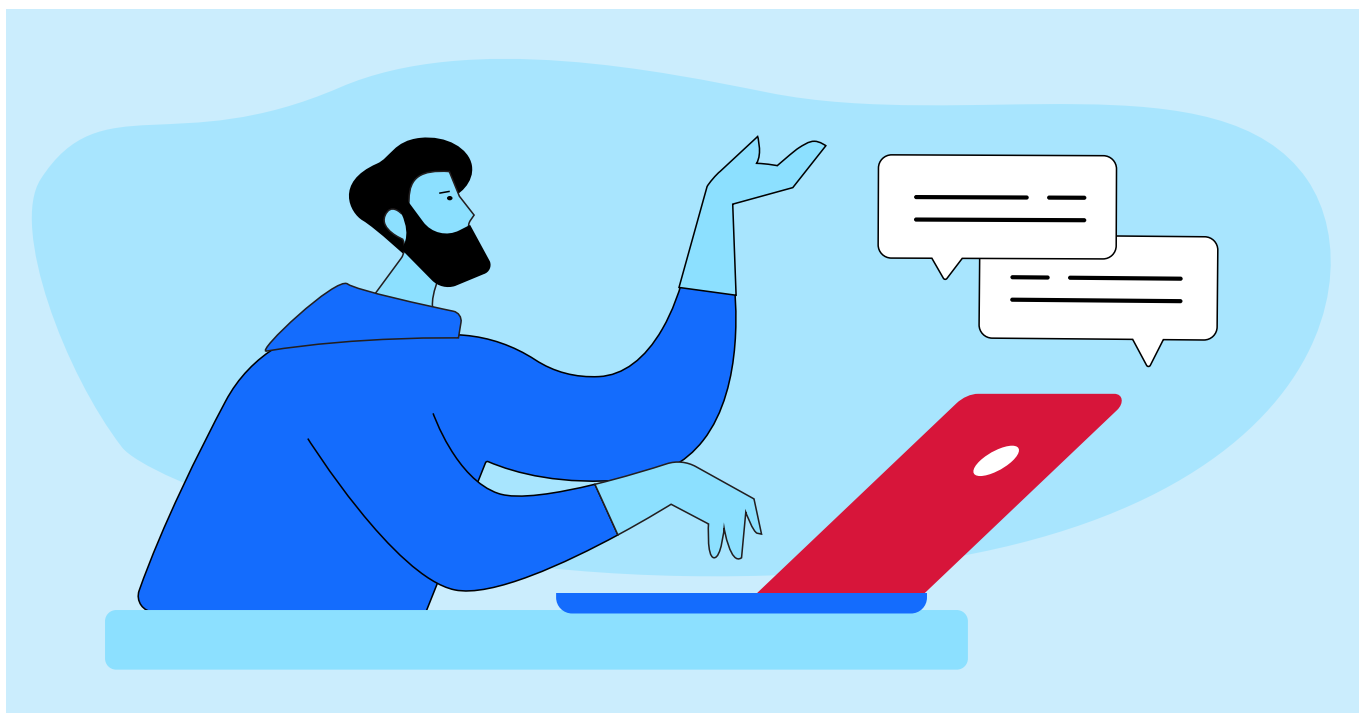


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Taking action to help customers in distress



Every day, people in distress access services provided by the NSW Government. These people include customers experiencing high levels of stress, challenging mental health issues and thoughts of suicide. Each of these interactions is an opportunity to reduce a customer’s distress and give them practical assistance. However, there is limited evidence about the staff behaviours that make the biggest difference to customers in distress.

To address this gap, the NSW Government have conducted first-hand research with people with a lived experience of distress, industry and sector experts, and frontline government staff. This Best Practice Guide contains the findings of that research.

It was clear when speaking to people that their interactions with staff in times of distress had a huge impact on their lives. When we asked people about their best experiences, many could vividly remember situations where staff were genuine, caring and really listened to them:

“The human connection and empathy is so important – it allows me to feel more secure and comforted”

Customer in co-design workshop

Some also spoke about the impact of negative experiences:

“It’s easy to feel really hopeless and questioning, thinking ‘why bother’”

Customer in co-design workshop

Excellent customer service can help customers in distress feel cared for, safe and less alone. This guide shows how our services can put customers in distress at the centre, and deliver services that are easy, fair, accessible, transparent and empathetic for all our customers.

What is covered in this guide?

This guide outlines what customers expect from our services when they are in distress. It provides practical recommendations on the most helpful actions staff can take to make sure every person in distress who comes to a NSW Government service is treated with compassion. We outline how the Customer Commitments apply to interactions with customers in distress so every customer can have a first-class experience.

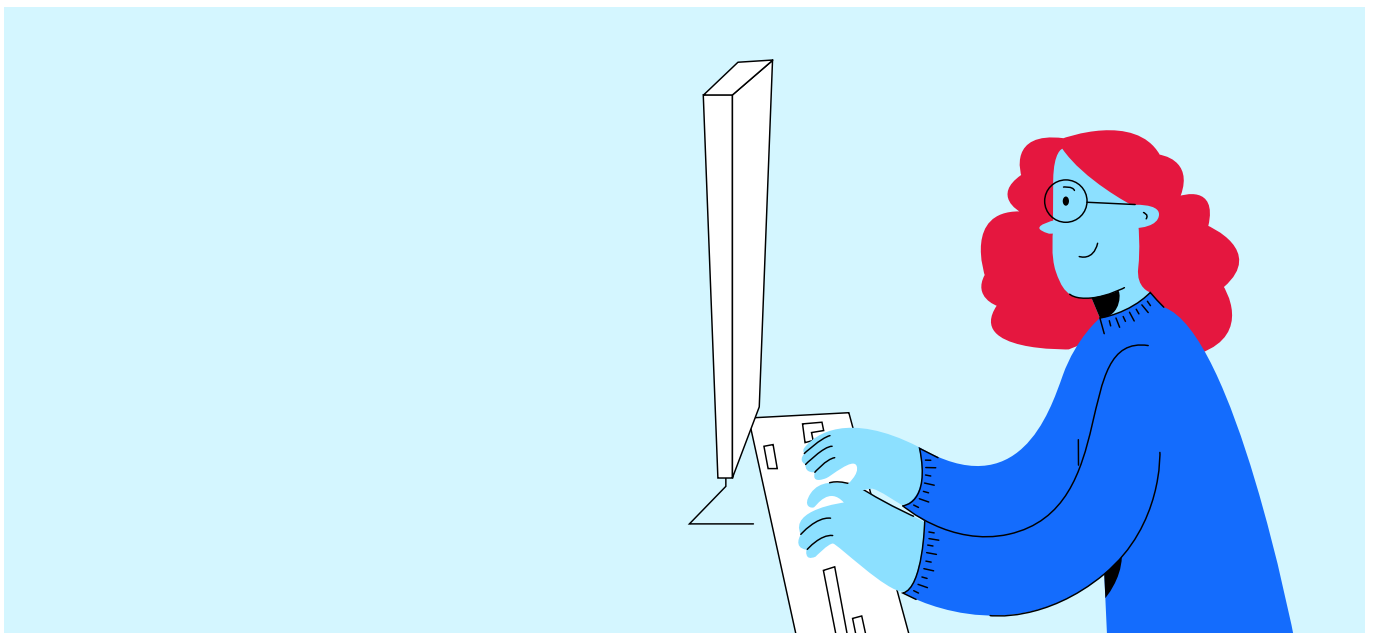
The guide was created by the NSW Behavioural Insights Unit and the Premier's Implementation Unit, using first-hand research and evidence from behavioural science. It was co-designed with people with a lived experience of suicidality, industry and academic experts and frontline staff from non-health government agencies.

Who is this guide for?

This Best Practice Guide is designed for:




-  **NSW Government organisations**
-  **People managers**
-  **Frontline staff, working in non-mental health or social work related fields**

Note that this guide has been designed for frontline, public-facing staff who are not mental health specialists. We focus on interactions when customers are seeking help with non-mental-health related issues.



How to use this guide

You can use this guide to:

-  **Understand the most important actions your staff can take when helping people in distress**
-  **Set up your workplace to be a safe and supportive environment for customers in distress**
-  **Give your staff the support they need to stay well and keep responding compassionately**

We know that each agency has many unique workforces, environments and customers, and requires a tailored approach. This guide offers a range of recommendations that can be applied in different ways to suit the unique circumstances of your staff and customers.

This guide offers a general approach, based on research with a variety of people from different backgrounds with different life experiences. However, it is not tailored to be culturally appropriate for any particular group. It is essential to consider the different life experiences and backgrounds of your customers to ensure your specific response is effective.

Acknowledgements

This guide has been developed with the expertise and experience of people from many different government and non-government organisations. Thanks to all the suicide prevention leaders and experts who helped inform this guide.

We particularly would like to thank those with a lived experience of distress and suicidality who contributed to this research. This guide would not have been possible without your knowledge and insight.



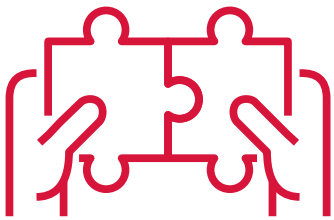
Where to begin



Section 1

Which behaviours matter most for customers in distress?

This section covers the most important behaviours staff can do to help customers in distress. Our behaviour blueprint shows the most helpful actions staff can take when working with people in distress.



Section 2

How do these behaviours help you fulfil the NSW Government Customer Commitments?

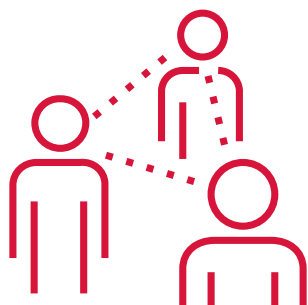
This section covers what customers in distress expect from our services. The NSW Government has six Customer Commitments, and we show how these apply for customers in distress.



Section 3

How can you support these behaviours in your agency?

This section covers how you can use tools from behavioural science to support staff to do these behaviours.



Section 4

How can you take care of staff when working with customers in distress?

This section covers strategies you can implement to take care of your staff and help them stay well while working with customers in distress.



Section 1

Which behaviours matter most for customers in distress?

This section shows the most helpful behaviours your staff can do when interacting with customers in distress. It can be used to:

- Align your current policies and processes with best practice
- Form the basis for tools and training for your staff

Research insights

A compassionate, genuine and positive interaction with a staff member has multiple benefits for customers in distress. It can decrease the likelihood of their distress escalating and help them progress towards their goals. Customers described feeling a sense of accomplishment, relief and hopefulness after getting the help they needed.

How might a customer in distress feel entering a service? People described feeling anxious, powerless, exhausted, and isolated.

“There is a sense of shame around being in the situation which is exacerbated by a condescending approach (many times unintended).”

Customer in co-design workshop

What is a customer’s goal? Customers who had experienced distress while at a service told us their most important goal was to have a quick and easy interaction and get help with the issue that brought them into the service.

“I hope that I will get someone who will help me and easily understand my situation. I hope I’ll be really listened to.”

Customer in co-design workshop

A compassionate response also increases the likelihood that a staff member can achieve their goals in service delivery. When customers are less distressed, they are better able to listen and remember.¹

It can be difficult to know which staff actions are most important to convey compassion and empathy to customers. We spoke with customers with a lived experience of distress and with sector experts and identified over 120 potential actions staff could do to help customers in distress. We then worked with customers and experts to determine which of these actions were most important. These ten actions make up the ‘Behaviour Blueprint’ in this section.



120 potential actions

to help customers in distress, identified through co-design workshops with customers and experts

*Priorisation
with customers
and experts*

Behaviour Blueprint

with 10 most important actions

Behaviour Blueprint: Which behaviours matter for customers?

We worked with customers and sector experts to identify the ten most helpful actions staff can do reduce distress and keep customers safe. See Appendix 1 for a one page version of this blueprint.

In all interactions...

Action	It might look like ...	Why it is important
Make the customer feel welcome using non-verbal actions	Warm tone of voice Gentle smile	The customer feels cared for and accepted. They are more likely to share their situation.
Give the customer your full attention	Not typing or taking notes – or telling a customer what they’re doing, if they need to take notes Making eye contact with the customer (where appropriate)	The customer feels valued and that they are the focus.
Use simple and clear language and give the customer time to think	“Take your time” “Do you have any questions?”	The customer can concentrate and understand the situation. Any misunderstandings can be corrected.
Give clear guidance on how you can help the customer	“I am able to help you lodge your application and I can give you resources to help with your other issue”	The customer knows what to expect and what help they can access.
Write down the information and next step for me	Writing down what the customer needs to do next or what to expect Providing printed information about the process	The customer has a reminder of what they need to do and knows what to expect.

“When people are in distress, they don’t absorb information really well. You have to slow down and explain things and get them to hear back. It’s hard to know what they’re going to remember”

Staff member in interview

When a customer is distressed ...

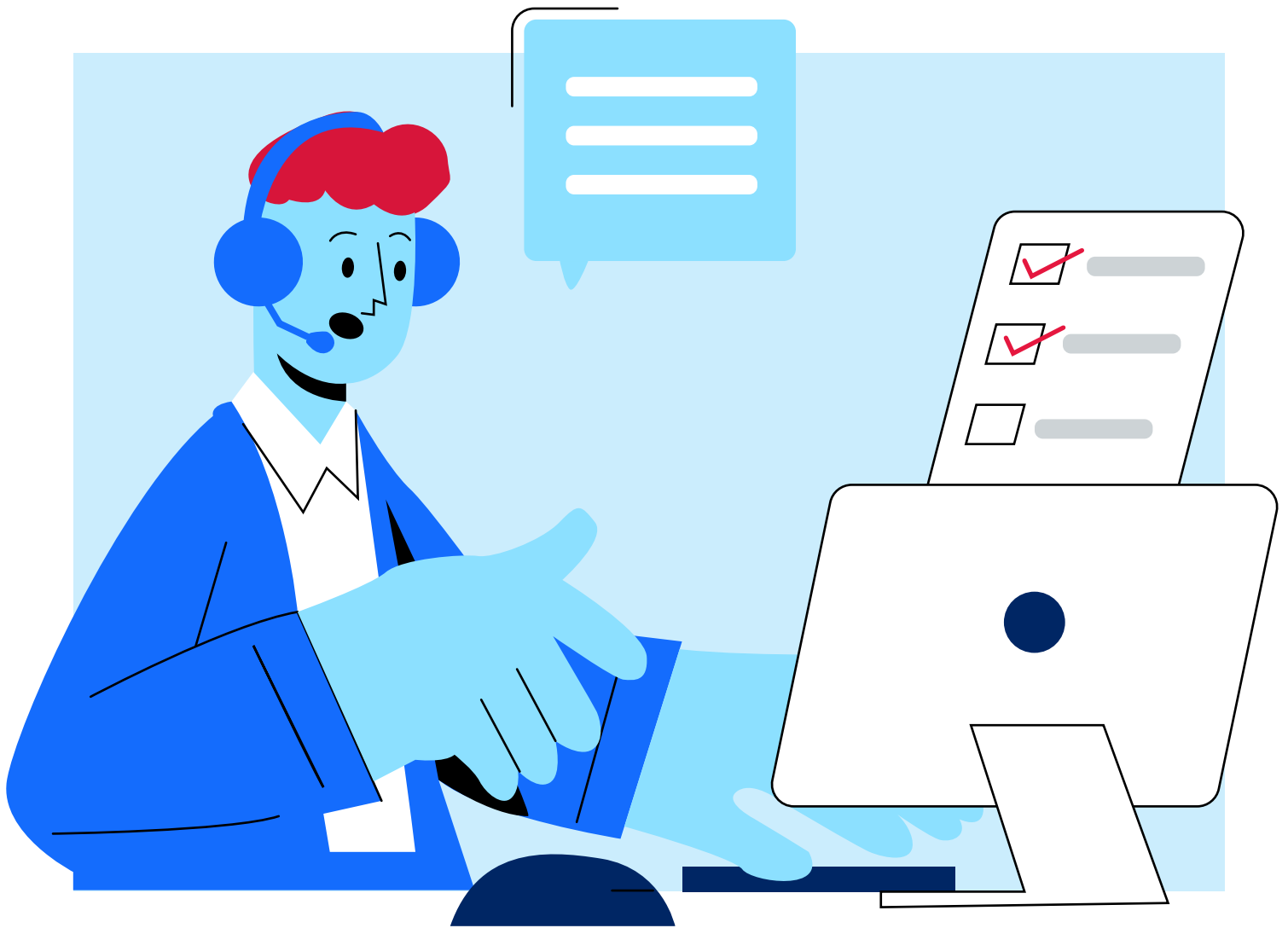
Action	It might look like ...	Why it is important
Acknowledge the customer’s distress	<p>“Are you okay?”</p> <p>“I can see this is really hard for you.”</p>	The customer feels safe and like they are not alone.
Show the customer you empathise	“That sounds like it was really frustrating.”	The customer feels like their problem matters and they are understood.
Ask the customer for consent before taking an action (e.g. before calling a family member)	“I am concerned about you getting home. Could I call your daughter?”	The customer feels respected and that they have control over their situation.

“The importance of the human connection and empathy – it allows us to feel more secure and comforted.”

Customer in co-design workshop

When a customer is very distressed or says they are thinking about suicide ...

Action	It might look like ...	Why it is important
Find out if the customer is safe now	“Are you safe now?”	The customer can share any immediate threats to their safety.
Work with the customer to help them find ways to stay safe	<p>“How can we help keep you safe now?”</p> <p>“Can we think of some ways you can take care of yourself while you’re feeling like this?”</p> <p>“Is there anyone you reach out to who could keep you company?”</p> <p>“Is there anyone you reach out to who could keep you company?”</p> <p>“I want to make sure you have the right help and support. Would it be helpful for me to share some resources of other places that can give you support?”</p>	<p>The customer has support to identify ways to stay safe and think of potential resources they have around them.</p> <p>The customer feels they are not alone in the situation.</p>



Section 2

How do these behaviours help you fulfil the NSW Government Customer Commitments?

This section covers what customers in distress expect from our services.

Customers with a lived experience of distress told us that being provided with excellent customer service made a big difference for them. The NSW Government has six Customer Commitments, a promise to customers about what they can expect from us. Below, we have shown how these commitments can be realised for people with a lived experience of distress.

These recommendations cover how staff respond to customers and how the service environment is set up. Setting up your service to help customers feel calm and safe from the beginning allows customers to focus on the issue that has brought them to the service.



Easy to access

Customers find our services easy to access when interactions are simple and services are readily available



Act with empathy

Our services are focused on understand and responding to the situations, needs and points of view of our customers



Respect my time

Being respectful of time is key to a positive experience for customers using our services

What customers in distress told us

It can be difficult to be in crowded or busy spaces when distressed.

A lack of basic facilities makes it harder to manage distress.

“People need to be genuine and responsive-not like they are reading from a script or going through the motions.”

When services showed they understood customer needs, customers felt heard, respected and valued.

“The wait time with no advice as to how long the wait time will be is extremely stressful.”

Long wait times are one of the most stressful situations when in distress.

What customers in distress wanted

Provide a calm, comfortable service environment – this can look like comfortable furniture, access to bathrooms, water and basic snacks.

Give me information in my language – this can look like brochures in languages commonly spoken by customers, easy process to obtain a translator.

Listen to me – this can look like showing you have heard the person, checking they’ve understood what you’ve said, not making assumptions about them or their needs.

Show me you care – this can look like using words that show you care, greeting customers warmly, showing you understand the challenges they’ve faced.

Minimise my wait – this can look like reducing wait times where possible for people in distress.

Set clear expectations – this can look like communicating clearly and accurately about how long wait times are likely to be.

Help me now – this can look like a ‘no wrong door’ policy, providing warm referrals to other services when you are not able to help.



Explain what to expect

Customers need to understand what steps are involved and be contacted when they need to know something



Resolve the situation

Customers expect us to deliver an outcome and be accountable for our actions along the way



Engage the community

Customers expect us to meaningfully engage with them about how they want services delivered

What customers in distress told us

It can be very confusing navigating services when customers are feeling distressed.

Customers may have more difficulty remembering information and understanding what they need to do.

“Don’t make me feel like a burden.”

When services worked in partnership with them to achieve their goals, customers felt comfortable and hopeful.

“Services should recognise that people have different journeys and their own individual circumstances.”

What customers in distress wanted

Clearly explain the process to me – this can look like visual representations of the process, written instructions on what’s next.

Give me different ways to engage – this can look like having a range of ways to engage with a service (digital, over the phone, face to face) so customers can choose the most accessible one for them.

Partner with me – this can look like asking what is a good outcome for the customer, keeping their goals in mind, providing clear instructions that help them follow through.

Connect me with help for my distress – this can look like referral resources (e.g. brochures, posters), a warm referral process to more intensive support for distressed customers who need immediate help.

Make me feel welcome at the service – this can look like inclusivity training for staff, visual cues (e.g. LGBTQIA+ flags and posters), signs saying ‘We welcome everyone – let me know your preferred pronouns and I will use them.’



Section 3

How can you support these behaviours in your agency?

This section provides a four step plan to implement the behaviour blueprint at your workplace and overcome common barriers faced by staff when interacting with customers in distress.

Research insights

Our research found some common barriers to staff responding compassionately when working with customers in distress:



Lack of time

Staff who have a high workload and limited time may feel the need to make trade-offs between providing professional support and connecting with customers. This is often exacerbated by the perception that responding compassionately is time consuming, which is often not the case.

“You have to sort of get rid of them because you have another 4 calls waiting. You know.”

Staff member in focus group



Status quo bias

Staff may experience fear and anxiety about how to respond to distress, as well as feeling pressure to do ‘the right thing’. This may lead to staff sticking with the status quo and not acknowledging customer distress.



Lack of feedback

Staff often have limited avenues to receive feedback on how they responded to a customer’s distress. This limits their ability to problem solve and improve their practice.



Role construction

Some staff see helping customers with their distress as outside of their role as they are ‘not counsellors’. They may not be aware that helping a customer with their distress can mean the customer is more likely to retain the information they are sharing and access help for the issue they have brought to the service.



Unsure of what to do

Staff may be unsure of the best way to respond to customer distress and which actions will be helpful for customers, particularly when in a stressful situation with a customer in front of them.

The following steps can help you set up your service to overcome these barriers.

Steps to encourage compassionate staff behaviour



Timely tools

Many staff told us that it was difficult to remember how to respond to a customer in distress when the customer was standing in front of them. Staff need clear, simple and visible guidance about what to do when they are helping a customer in distress.

Ways to address

- Use the Behaviour Blueprint to making short, simple guides that give staff memorable ‘rules of thumb’ on how to respond when a customer is in distress.
- Personalise these resources for your work environment:
- Use examples that are relevant to your staff, including situations they are likely to have encountered or heard about.
 - Providing examples with exact wording can help staff overcome fear and uncertainty in the moment (see Blueprint examples).
 - Use a format that works for your staff, for example call centre staff at Service NSW have a ‘big red button’ they can press on their desktop to pull up a step-by-step guide to working with a customer in distress. Staff who are out and about may need a pocket guide they can easily keep in a backpack.
- Make the resources easily available and remind staff about them, including before they are likely to encounter customers in distress. We frequently heard staff say they knew there were policies “somewhere” but they had not looked at them.



Regular reinforcement and feedback

Many staff talked about receiving one off training when they first started about responding to a customer in distress, but this was never mentioned again. This kind of training rarely results in long term behaviour change.²

Ways to address

- Make training regular (e.g. an annual training module for your team).
- Use part of the training time to help staff make a plan for what they will do when encountering a customer in distress. This kind of ‘if-then’ planning is shown to increase the likelihood of behaviour change.³
- Upskill managers in debriefing and coaching, so they can provide immediate feedback and support for staff after they encounter a person in distress.
- Create opportunities for staff to practice their skills in a safe way (e.g. role-playing).



A single message

Staff receive signals about how they should behave from many sources in the workplace, including policies, processes, communications, job descriptions and trainings. When these conflict, staff can become confused about what is expected of them and not see responding compassionately as a core part of their role.

Ways to address

- Signal to staff that responding compassionately is an important part of their role by making sure it is included in job descriptions, policies etc.
- Audit what staff are hearing from you in policies, processes and trainings to see if the information is consistent. When multiple trainings are being conducted (e.g. Vicarious trauma training, Mental Health First Aid etc) there may be inconsistencies.
- Update your policies, processes and trainings to align with the actions in the Behaviour Blueprint.



Meaningful motivation

When staff performance is measured by quantitative metrics (e.g. time of call length), these can overshadow qualitative metrics (e.g. service quality). In our research we talked with staff working in environments with KPIs about lengths of customer interactions. They felt this led to behaviour that impacted their relationships with customers, such as talking quickly and cutting off customers.

Ways to address

- Set goals for staff that align with these behaviours and are focussed on quality of interaction.
- Show that responding compassionately is rewarded in your agency.



Section 4

How can you take care of staff when working with customers in distress?

This section provides a four step plan to implement the behaviour blueprint at your workplace and overcome common barriers faced by staff when interacting with customers in distress.

Research insights

For staff to be able to help customers, they need to have the time and the tools to take care of themselves. Staff who don't have time or tools may experience burnout, secondary trauma and compassion fatigue, including feeling frustrated and powerless and feeling emotionally numb.

The quality of their service may deteriorate, as they are more likely to find it difficult to listen and concentrate and may develop suspicious and cynical views of others.⁴

“I think I end up afterwards quite drained. And sometimes my emotional reserves are then quite depleted. I might be more likely to, you know, snap and get really down or really angry.”

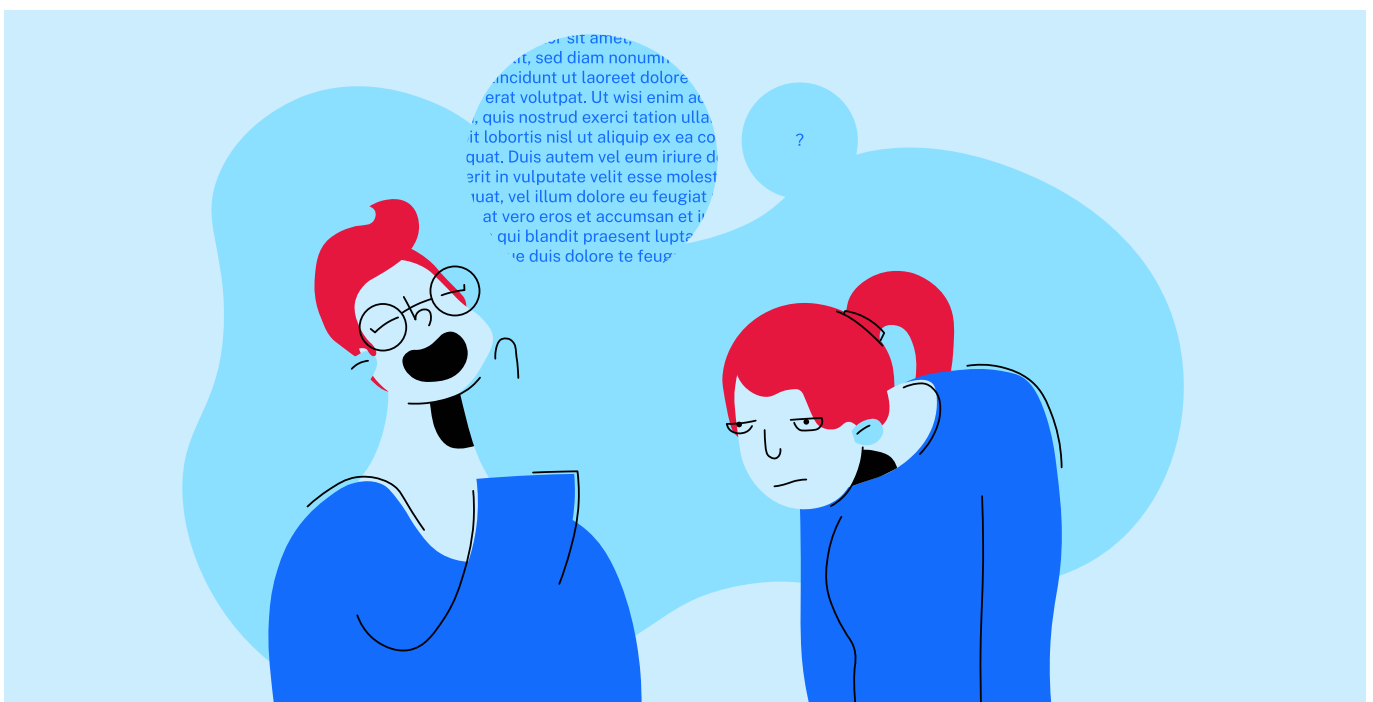
Staff member in interview

In our research, we asked frontline staff and managers what worked to help maintain their wellbeing and reduce compassion fatigue and secondary trauma. The strategies below are based on our research, behavioural insights and a review of the relevant evidence.

“Employees often dismiss their own distress. They were often in a state of huge distress by the time they approached me. I’ve now established an environment and reputation for trust and safety, so they are more comfortable approaching me.”

Manager in interview

Note that there is limited evidence for what works to reduce compassion fatigue and secondary traumatic stress.⁵



Strategies for supporting your staff

Action	It might look like ...	Why it is important
Structure staff workloads to reduce secondary trauma	<p>Rotate staff through positions with high trauma exposure⁶</p> <p>Make sure staff have regular breaks and work their designated hours.⁷</p>	The staff member has time and space to take care of themselves and manage stress
Help staff recognise and respond to aggressive or abusive conduct	<p>Give staff a clear policy and simple steps to respond to situations where customers are abusive or aggressive. This should help staff distinguish between distress and abusive behaviour and should prioritise staff safety. The NSW Ombudsman's guide to managing unreasonable conduct can help inform policy design⁸</p>	Staff know they have the right to be treated fairly by customers and know how to keep themselves safe
Set up ways for staff to support each other	<p>Set an expectation that staff debrief with managers after talking with a customer in distress. Debriefing is most helpful when staff have existing good relationships with managers.⁹</p> <p>Introduce group supervision sessions where staff can learn from each other and connect.¹⁰</p>	Staff get timely support and feel less isolated
Make it easy for staff to take care of themselves	<p>Ask each manager to work with their staff to make individual self-care plans to maintain their wellbeing.¹¹ This could include strategies like accessing an EAP, structuring their workload differently, and taking a break.</p> <p>Have a policy that staff take a break after helping a customer in distress</p>	The staff member feels more control over their work

Action	It might look like ...	Why it is important
<p>Make upskilling your staff part of BAU</p>	<p>Give staff tools they can use in the moment, when helping customers in distress (see previous section)</p> <p>Employ staff with expertise in helping others in distress, so they can mentor and coach others</p> <p>Upskill managers in debriefing and coaching</p>	<p>The staff member knows what they need to do and can get feedback on how to do it well.</p> <p>This helps them feel more hopefully and understand the boundaries of how they can help customers.¹²</p>
<p>Show staff their work makes a difference</p>	<p>Share messages of gratitude from customers</p>	<p>The staff member feels valued and connected to the purpose of their work</p>



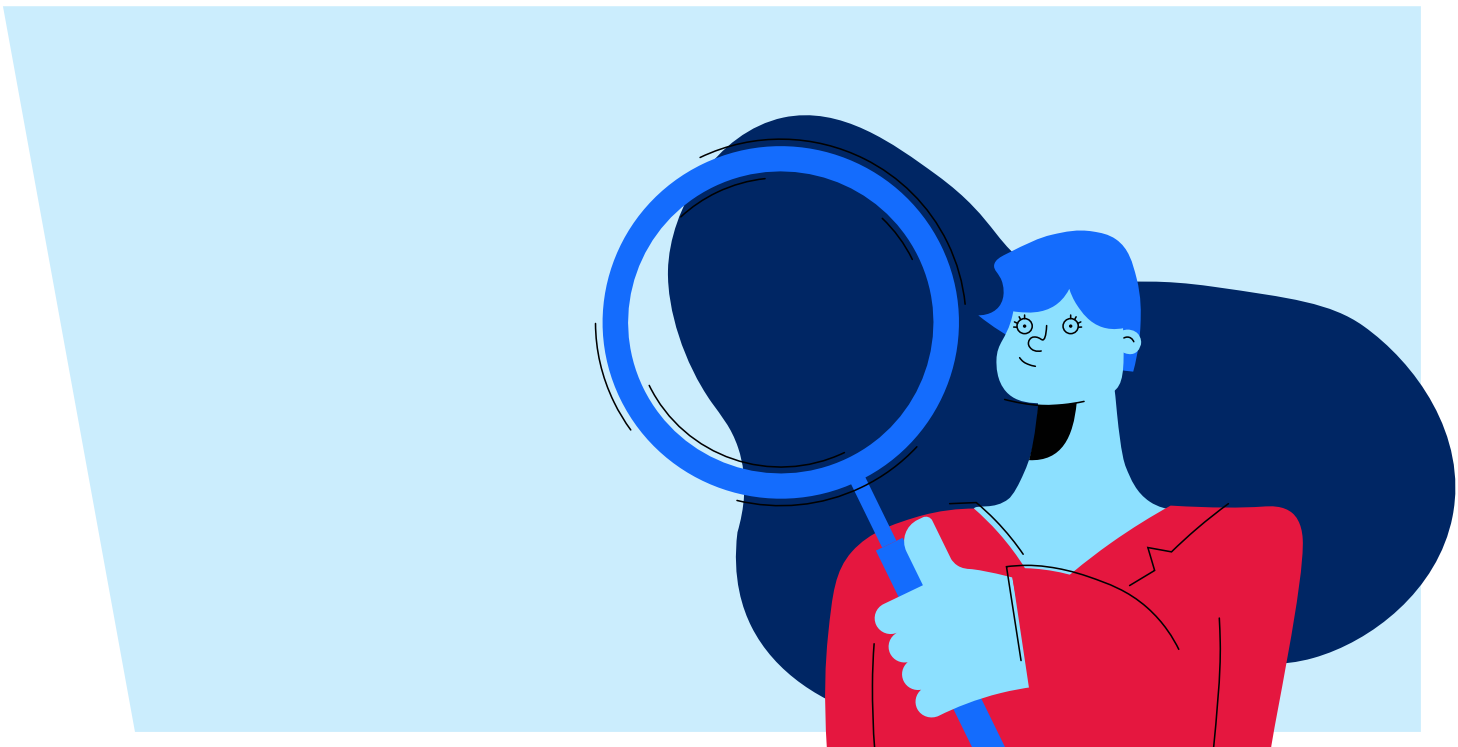
How was this guide developed?

The information in this guide is based on:

- **An evidence review of:**
 - Research into suicide prevention and responding to distress
 - Interventions to reduce compassion fatigue and secondary trauma in staff helping people in distress
 - Relevant literature from behavioural science
- **An in-depth case study of staff-customer interactions at a government agency, including:**
 - 15 in-depth interviews with staff and managers
 - 3 focus groups with 16 frontline government staff
 - Visits to 5 sites and observations of 28 interactions
- **Co-design workshops with:**
 - 12 people with a lived experience of suicidality
 - 5 frontline government staff
 - 9 experts from universities, suicide prevention service providers, advocacy organisations and research organisations
- **A questionnaire asking about the most helpful and important actions frontline staff could take to help customers in distress, distributed to:**
 - 50 responses from people with a lived experience of suicidality
 - 18 responses from sector and academic experts
 - 12 responses from friends and family of people with a lived experience of suicidality
- **User-testing the guide with NSW Government staff:**
 - 4 frontline staff
 - 7 managers

How the research was used

Section	Evidence used
Which behaviours matter most for customers in distress?	<p>Co-design workshop findings were used to create a long list of potential behaviours staff could do.</p> <p>Questionnaire data was used to refine the potential behaviours into the key actions list.</p>
How does this align with the Customer Commitments?	<p>Evidence review and co-design workshop findings were used to identify changes that impact a customer's distress.</p>
How can you support these behaviours in your agency?	<p>Evidence review, case study findings and user testing results were used to identify barriers to staff responding compassionately to customers and ways to overcome those barriers</p>
How can you take care of staff when working with customers in distress?	<p>Evidence review and co-design workshop findings were used to identify structural and individual changes that can reduce compassion fatigue, secondary trauma and burnout.</p>



Appendix 1: Guide on a Page

How to talk to a customer in distress

Our customers are often in difficult situations and experiencing distress. This tip sheet has some simple phrases and questions you can use when talking to a customer in distress.

Remember these key principles

Partner with me Ask what a good outcome is for the customer, keep their goals in mind and provide clear instructions.	Listen to me Show you have heard the customer, check they understand and avoid assumptions about their needs.	Show you care Greet customers warmly and show you understand the challenges they have faced.
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When you're helping a customer...

Make the customer feel welcome using non-verbal actions  Warm tone of voice. Gentle smile.	Give the customer your full attention  Not typing or taking notes. Make eye contact.	Use simple and clear language and give the customer time to think  "Take your time." "Do you have any questions?"
Write down the information and next step  Write down what the customer needs to do next or what to expect. Provide printed information about the process.	Give clear guidance on how you can help the customer  "I can help you lodge your application and give you resources to help with your other issues."	

These behaviors help the customer feel valued and accepted. Misunderstandings can be corrected and the customer know what they need to do and what to expect

Is the customer showing signs of distress? (Frustrated, sad, hopeless, checked out)

Acknowledge the customer's distress  "Are you ok?" "I can see this is really hard for you".	Show the customer you empathise  "That sounds like it was really frustrating"	Ask the customer for consent before acting  "I am concerned about you getting home. Could I call your daughter?"
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These behaviors help the customer feel safe, respected and understood

Is the customer very distressed or talking about suicide?

Find out if the customer is safe  "Are you safe now?"	Work with the customer to help them stay safe  "Can we help keep you safe now?" "Is there anyone you reach out to who could keep you company?"
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These behaviors help the customer feel supported and encourage the customer to share any immediate threats to their safety

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