Open Disclosure Course for Service Leaders: Fair Dealing, Honest Messages, Customer Trust Metrics

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Barcelona

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Programme Summary

Open disclosure is the subject of this one-week training course for customer experience directors, heads of service and communication leaders at managerial level, ending in a customer disclosure pack for one service. Customers lose trust when fees, limits, delays and mistakes are explained late, in vague language or only after a complaint. The programme moves from published commitments and fair dealing to honest messages, complaint candour and trust metrics, then applies each to a live case. Mars Training Centre UK delivers this programme on open disclosure to mixed-organisation cohorts.

The Business Case

Trust is built or lost in small moments: a conditions notice that nobody reads, a delay that nobody mentions, an error that is admitted only when found. Utilities, banks and airlines all handle such moments daily. Leaders who decide in advance what is disclosed, when and in what words protect repeat business and reduce the work of explaining after the event.

- Complaint Volume: Falls as limits, delays and charges are stated before customers meet them.
- Repeat Business: Improves as customers see commitments kept and mistakes admitted early.
- Escalation Cost: Reduces as complaint replies give reasons and next steps in plain words.

Principles and Evidence Base

- ISO 10001 Codes of Conduct for Customer Satisfaction: Guides how commitments to customers are written, published and kept, used in Sessions 1 and 2.
- ISO 10002 Complaints Handling: Sets out how complaints are received, answered and learned from, used in Sessions 3 and 4.
- ISO 10004 Monitoring and Measuring Customer Satisfaction: Guides the choice of measures that show whether trust is rising, used in Sessions 4 and 5.

Intended Participants

- Customer experience leaders who decide what customers are told and when.
- Heads of service who own complaint replies and service notices.
- Communication leaders who approve customer-facing messages.
- Quality and risk managers who test whether promises to customers are kept.

Typical settings include banking, utilities, telecommunications, travel and healthcare administration.

Learning Outcomes

1. Participants will be able to diagnose points in a service journey where silence or vague wording erodes trust.
2. Participants will be able to construct a register of customer commitments that can be published and checked.
3. Participants will be able to evaluate service notices and fee statements for clarity and fair dealing.
4. Participants will be able to design complaint replies and error admissions that give reasons and next steps.
5. Participants will be able to prioritise customer trust metrics for a service review.
6. Participants will be able to justify a customer disclosure pack to an executive team.

Programme Structure

Day 1: Open Disclosure and Published Commitments

What should customers be told, and which promises can be kept?

- Disclosure Principles Statement
- Customer Commitments Register
- Code of Conduct Outline
- Promise Testing Sheet
- Silence Cost Inventory

Day 2: Diagnosing Trust Gaps in the Service Journey

Where do customers feel misled, surprised or ignored?

- Trust Moment Journey Map
- Complaint Theme Review
- Fee and Condition Surprise Audit
- Frontline Disclosure Interviews
- Delay Communication Log

Day 3: Fair Dealing and Honest Messages

How are notices, offers and explanations written so that they are clear and fair?

- Plain Language Rewrite Method
- Fair Dealing Checklist
- Vulnerable Customer Message Review
- Service Notice Template
- Message Approval Gate

Day 4: Complaint Candour and Error Admission

How does an organisation admit mistakes and still keep trust?

- Complaint Reply Anatomy
- Error Admission Script
- Reasons and Next Steps Frame
- Escalation Route Design
- Learning Loop Record

Day 5: Customer Disclosure Pack for One Service

Do the earlier tools form one pack that an executive team can adopt?

- Applying the Session 1 Customer Commitments Register
- Testing the Session 3 Fair Dealing Checklist
- Reviewing the Session 4 Complaint Reply Anatomy
- Selecting Customer Trust Metrics
- Completing the Customer Disclosure Pack

Methodology

The programme uses peer review of real-style materials, built on a prepared file for one utility and one bank, each with a service notice, a fee statement, a delay message and three complaint replies. Participants rewrite and score the materials in small groups, then defend their changes to a panel playing the customer.

- Suggested activity: Rewriting a delay message so that it gives cause, impact and next step.
- Suggested activity: Marking a fee statement for terms that surprise customers.
- Suggested activity: Redrafting a complaint reply that denies fault into one that admits it and offers a remedy.

Capstone Output

Each participant completes a customer disclosure pack for one service. It holds a commitments register, a rewritten service notice, a fair dealing checklist, a complaint reply standard and a short set of trust metrics. The pack is used at work to brief an executive team, retrain writers of customer messages and set the first review date.

Frequently Asked Questions

Is an open disclosure course suitable for leaders who do not write customer messages themselves?

Yes. Open disclosure is taught through sample materials and checklists for those who approve, own or measure customer messages. It assumes service or communication experience, but no earlier work in drafting notices or replies.

Which standards does open disclosure rest on?

Open disclosure rests on ISO 10001 for codes of conduct, ISO 10002 for complaints handling and ISO 10004 for monitoring and measuring customer satisfaction.

How is the pack from open disclosure used at work?

You use the customer disclosure pack to brief your executive team, replace weak notices and reply templates, train writers and decide which trust measures to review.

How does open disclosure differ from a complaint handling systems course?

Open disclosure concentrates on what customers are told, how plainly and how early, while a complaint handling systems course concentrates on the processes, tools and roles that record and resolve complaints.