Learning Objectives

By attending this session, participants will be able to:

• Describe some typical client issues WAP encounters.
• Name some fundamental aspects of a good client relations policy.
• Access tips for dealing with difficult clients.
Who are our clients?

Anyone can be a weatherization client!
Intake Staff Attributes:

- Personable
- Detail-oriented
- Tactful
- Flexible
- Must maintain client confidentiality
Issue #2 - The Waiting List

Be sure your agency establishes clear criteria for priority on the waiting list.

Priorities Created by Statute and/or Regulation

» Elderly persons
» Persons with disabilities
» Families with children
» High residential energy users
» Households with high energy burden
Issue #2 - The Waiting List (continued)

Additional waiting list considerations of an organizational nature:

- Priority Point System
- Certified Application Date
- Geography
- Native Americans
- Coordinating activities with other funding sources
- Prioritizing by Housing Type not allowed
Issue #3 – Auditor’s Communication Skills

The weatherization energy auditor plays an important role in establishing a good relationship with the client.
Crews and field staff should provide good customer service to the clients in addition to performing the best work product possible.
Issue #5 – Possession Anxiety

Client homes and items should be protected before any weatherization work begins.

Photos courtesy of US Department of Energy
It is important to respect the client’s privacy.
Respect, Respect, Respect!

Field Staff, Installers & Contractors:

• Treat the client as they would wish to be treated.
• Treat the home as they would treat their own home.
• Replace anything that gets broken.
• Clean anything that gets dirty.
• Remove all junk and trash generated on site.
• Leave the home “broom clean” after work each day.

Field Staff, Installers & Contractors SHOULD NOT:

• Use drugs.
• Use profanity.
• Smoke on client property.
• Buy anything from clients or sell anything to them.
• Conduct side deals for extra work.
Client Relations Policy

Code of Conduct for Workers

- Respect for others.
- Conflicts of interest.
- Privacy of clients.

Grievance Process for Clients

- When things go wrong.

Photo courtesy of Salt Lake Community Action Program
Client Relations Policy | Code of Conduct

Client Relation Policy

- Workers Code of Conduct
- Conflict of Interest
- Confidentiality Policy
Client Relations Policy – Grievance Process

It is crucial to identify any potential issues or “off limit” areas with the client before work begins.
Dealing with Difficult Clients #1

A difficult client may be one who:

• Believes weatherization workers should do more work to the home than called for by the energy audit or priority list.

• Maintains that the installers did not complete the job even when the Work Order defined by the audit is complete.

• Appeals to higher authorities that they are not receiving service fast enough.

• Feels “wronged,” slighted, or taken advantage of.

• Simply won’t take “No” for an answer.
Dealing with Difficult Clients #2

A difficult client WILL be persistent. Use these tips:

• When your agency is wrong, admit it and rectify the problem.

• If you are in the right:
  – Be attentive and listen to the client’s complaints.
  – Remain calm. Never show anger toward the client.
  – Know your facts and diplomatically stand your ground.
  – Follow up on every conversation in writing and document all correspondence in the client file.
If all else fails...

- If all reasonable attempts to resolve problems with a difficult client fail, the Subgrantee PM should notify the Grantee PM.

- The Grantee PM should follow the same tips outlined on the previous slide.

- Passing the client from the Grantee PM to the DOE Project Officer is usually only done if:
  - The Grantee PM feels that the client is a physical threat or likely to create extremely adverse publicity.
  - The client specifically asks to speak to someone at a level higher than the Grantee’s office.
Summary

• Train all staff to treat clients and their property with respect.
• Be sure Subgrantee intake workers are well-versed in client confidentiality requirements.
• Have and communicate a clear priority policy to establish an order of service and always follow the policy to the letter.
• Have a written client grievance policy with clear channels to follow, especially regarding difficult clients.
• Remember, and stress to field staff, that the client is the reason the program exists!