JUPITER PRIME

Consulting • Training • Advisory

جوبيتر برايم للاستشارات والتدريب

COURSE BROCHURE

Customer Fair Treatment Governance and Compliance Training Course

22 – 26 February 2027
Munich

Customer Fair Treatment Governance and Compliance Training Course

Ref: 3095_117563 **Date:** 22 – 26 February 2027 **Location:** Munich **Fees:** 5600 GBP

Customer Fair Treatment Governance and Compliance is a 1-week training course for customer experience leads, compliance officers and complaints managers who build a Fair Treatment Oversight Pack covering outcome measures, escalation routes and board evidence. Organisations now face sharper scrutiny of how customers are treated across branches, call centres and digital channels. Jupiter Prime Training delivers this course on customer fair treatment governance and compliance.

Why Customer Fair Treatment Governance and Compliance Matters Now

Three forces shape fair treatment oversight today. Supervisors and boards increasingly ask firms to prove good customer outcomes rather than describe policies. Digital journeys, automated decisions and outsourced service partners widen the places where harm can arise unseen. An organisation that handles this well catches unfair outcomes early, fixes root causes and reports credibly to its board. The course rests on outcome-based conduct oversight, root cause analysis of complaints and a clear allocation of accountability across operational, oversight and assurance functions.

Who Gains Most from Customer Fair Treatment Governance and Compliance

- Experience owners responsible for journey design, service standards and channel consistency
- Compliance specialists who monitor conduct, test controls and advise on customer treatment rules
- Complaint handling leads who triage cases, set redress and spot recurring failures
- Product and pricing owners who judge whether terms and charges deliver fair value
- Operational risk partners who log conduct incidents and track remediation actions

Mixed groups from one organisation gain most, leaving with a shared view of outcomes and escalation duties.

Customer Fair Treatment Governance and Compliance Capabilities

Participants move from stating fair treatment principles to evidencing them with outcome indicators and case reviews.

- Design outcome indicators for each customer journey stage — product approval and service committees
- Assess complaint data for root causes and systemic patterns — remediation prioritisation
- Specify escalation triggers and response timelines for conduct breaches — senior accountable owners
- Apply vulnerability identification and adjustment practices across channels — frontline supervisors
- Weigh fair value evidence for charges, terms and bundles — pricing decisions
- Communicate conduct risk findings in board-ready dashboards — directors and audit committees

Key Customer Fair Treatment Governance and Compliance Terms

- Customer outcome — The real result a customer experiences from a product or service against their reasonable needs.
- Conduct risk — The chance that an organisation's behaviour, decisions or processes cause harm to customers or market integrity.
- Root cause analysis — A structured search for the underlying process, product or people failure behind a group of related complaints.
- Customer vulnerability — Personal circumstances such as illness, bereavement or low capability that make a customer more likely to suffer harm.
- Fair value assessment — A judgement of whether the total price a customer pays is reasonable relative to the benefits received.
- Redress — Putting a customer back in the position they would have been in had the failure not occurred.

Customer Fair Treatment Governance and Compliance Day by Day

Day 1: Forces Behind Fair Treatment Expectations

- Outcome-Based Conduct Oversight — Shift From Policy Statements to Evidence
- Customer Harm Taxonomy — Classifying Foreseeable Harm Across Journeys
- Channel and Partner Mapping — Locating Treatment Risk in Outsourced Service
- Accountability Allocation Map — Naming Owners for Each Customer Outcome
- Stakeholder Expectation Scan — Board, Supervisor and Advocacy Group Priorities

Day 2: Measuring Customer Outcomes

- Journey Outcome Indicators — Selecting Measures for Understanding and Support
- Tolerance Thresholds and Rating Scales — Defining When Outcomes Turn Unacceptable
- Call and Case File Sampling — Testing Real Interactions Against Standards
- Fair Value Assessment Matrix — Weighing Charges Against Customer Benefits
- Management Information Design — Separating Activity Counts From Outcome Signals

Day 3: Complaints, Vulnerability and Redress

- Complaint Triage and Categorisation — Routing Cases by Harm Severity
- Complaint Root Cause Mapping — Linking Complaint Clusters to Process Faults
- Vulnerability Identification Prompts — Adjusting Service for Customers in Difficulty
- Redress Calculation Principles — Restoring Customers Fairly and Consistently
- Lessons Learned Register — Feeding Complaint Insight Into Product Changes

Day 4: Controls, Escalation and Board Reporting

- Conduct Control Testing Plan — Checking Design and Operation of Key Controls
- Escalation Route Design — Triggers, Timelines and Decision Rights for Breaches
- Conduct Incident Log — Recording Events, Impact and Remediation Status
- Board Conduct Dashboard — Presenting Outcome Trends and Emerging Concerns
- Annual Fair Treatment Attestation — Evidencing Board Challenge and Sign-Off

Day 5: Practising the Fair Treatment Oversight Pack

- Retail Lending Journey Case — Applying Outcome Indicators and Thresholds
- Telecoms Billing Complaint Case — Applying Root Cause and Redress Steps
- Vulnerable Customer Escalation Drill — Applying Triggers and Decision Rights
- Peer Challenge of Dashboards — Testing Clarity for Directors
- Fair Treatment Oversight Pack — Finalising Measures, Routes and Board Evidence

Applying Customer Fair Treatment Governance and Compliance After the Course

- Run a root cause review of the last quarter's complaint clusters and present three remediation priorities to the conduct committee.
- Pilot two journey outcome indicators with tolerance thresholds on one high-volume product and report the first results to the board dashboard.

Customer Fair Treatment Governance and Compliance Questions FAQ

What is customer fair treatment governance and compliance and why does it matter now?

It is the oversight that proves customers receive fair outcomes across every channel. It matters now because supervisors, boards and customers expect evidence of outcomes, not policy statements.

Which roles gain most from customer fair treatment governance and compliance?

Customer experience leads, compliance officers and complaints managers gain most. Product owners and operational risk partners also benefit, since they shape the terms and controls behind outcomes.

How does customer fair treatment governance and compliance differ from a customer service course?

It focuses on oversight, accountability and evidence rather than frontline service skills. It builds the measures, escalation routes and board reporting that show whether treatment is fair organisation-wide.

What do you bring back from customer fair treatment governance and compliance training?

You bring back a draft oversight pack with outcome indicators, tolerance thresholds, escalation triggers and a board dashboard layout.

Customer Fair Treatment Governance and Compliance: The Way Forward

The Fair Treatment Oversight Pack first informs which customer journeys need outcome monitoring and which thresholds trigger escalation. Conduct committees, compliance teams and complaints leads use it to agree priorities and report to directors. After its first quarter of use, revisit the thresholds and indicators, keeping the signals that best predict customer harm.