



GETTING IT RIGHT WITH YOUR TRANS SERVICE USERS AND CUSTOMERS

How to ensure your service
delivery or customer
service is trans inclusive

SUPPORTING TRANS
STAFF IN THE WORKPLACE

In collaboration with

trans^{*}formation



Stonewall

Acceptance without exception

GETTING IT RIGHT WITH YOUR TRANS SERVICE USERS AND CUSTOMERS

Ensuring that your service delivery or customer service is trans inclusive will ensure that:

- You are not creating barriers which prevent trans people from accessing your services or products
- Your services or products are fully inclusive
- You will avoid any potential lawsuits or reputational damage, and fulfil legislative requirements
- You fulfil your public sector equality duty (if your organisation is a public sector body)
- You capitalise on the spending power of the trans community and allies (if your organisation is for-profit)
- You are able to demonstrate your commitment to the wider trans community

Like anyone, when a trans person has a bad experience with your service or product, word spreads and other members of the LGBT community and its allies will be less likely to access your services or business. Demonstrating that you are trans inclusive will encourage loyalty to your service or product and have a positive effect on your organisation.

You should treat all trans service users or customers as you would anybody else, just keep in mind any additional barriers you may have created that prevent them from accessing your service or product.

THINKING ABOUT YOUR SERVICE USER OR CUSTOMER JOURNEY

The best way to ensure your service is trans inclusive is to examine and scrutinise the journey a potential service user or customer may take.

You should map out the journey for your organisation in order to identify different touch points. These could include where gender is required on any documentation or where there is direct communication or interaction between front-line staff and the public. You should examine the routes from several perspectives.

1. If gathering information on gender, is it really needed?

- If the information is needed, do you give people the opportunity to use their own term to define their gender?

2. Any circumstances where misgendering or transphobia may occur across different communication mediums, such as over the phone, email and face-to-face

3. In the provision of facilities, such as toilets or changing rooms

EXAMPLES:

- Call centres where operatives may assume a person's gender by their voice
- Setting up accounts or appointments where information about gender is gathered
- Sales assistants using gendered greetings such as 'sir' and 'madam'

SYSTEMS, DETAILS AND DATA

THINKING ABOUT YOUR SERVICE USER OR CUSTOMER JOURNEY

If it's necessary for a person to inform you of their gender when signing up to a service or to purchase a product (although this should be rare), they should have the option to define their own gender if they wish to. In order to record this information, you should use the following question:

GENDER:

Female

Male

If you prefer to use your own term, please describe it here:

Giving people this option will demonstrate to them that your organisation values everyone. In contrast, just giving the options of male and female may put people in an uncomfortable situation, especially if the question is compulsory, where they have to select an option which doesn't describe how they feel about themselves.

Although this question format may mean it's slightly harder to break down the data you have, it will also lead to a richer data set and give you a better understanding of your customers or service users.

FORMS OF ID

If a person requires identification in order to use a service or purchase a product, you should allow them to select from a variety of different identification options, for example, a passport or driving licence. Many trans people do not want to, or cannot change their legal gender, so requiring them to supply a birth certificate may present a barrier to them accessing your service or product.

CHOOSING A TITLE

Increasingly, organisations are including an option for the gender neutral title Mx when registering for a service or product, in addition to Mr, Mrs, Miss and Ms.

Many non-binary people may prefer to choose this option as well as those who simply don't wish to disclose their gender. You should ensure that all your staff are aware of what Mx means and how they should communicate with someone if using this title – by not assuming their gender and using the gender-neutral pronoun 'they' when communicating with the individual.

CHANGING NAMES AND GENDER ON SYSTEMS

Customers and service users should have the ability to change details about their name or gender on your systems at any time in order for them to contain correct and up-to-date information. Members of staff who use these systems should be made aware of this and be trained to do so sensitively and without asking unnecessary or personal questions. People should be able to change their information efficiently and sensitively.

Staff who deal with these changes should be informed that:

- A person does not need to hold a gender recognition certificate in order to change this information (it is also a criminal offence to disclose someone's gender history if they hold a gender recognition certificate)
- A person wishing to change this information should be treated with respect like any other customer updating their details
- A person wishing to change this information may feel hesitant in changing it, so customer service and sensitivity is of the utmost importance when carrying out the process
- Customer service staff should not ask personal questions during the process and remember their professional role in the transaction

TRANS EXPERIENCES

Recently I applied for a new bank account online and was really over the moon that they offered a free text box so I could input my preferred title of 'Mx'.

It's such a rarity to be able to use 'Mx' as most forms still only have a dropdown of pre-filled titles that means that I'm regularly forced to select Mr. Although this probably doesn't sound like a big deal, when there isn't an 'Mx' or free-text option, it makes me feel that that company – and the wider world – doesn't believe in or care about my non-binary identity.

That hurts – especially as people like me who don't identify with binary genders are constantly told we aren't valid or don't exist. I was still anxious that I was going to get a phone call from the bank double-checking it wasn't a typo on my part, or that they'd take it upon themselves to correct it, but instead I received my confirmation letter and new debit card with 'Mx' on it and I couldn't have been happier!

ALEX

Once I changed my name via deed poll, I took my deed poll to the bank as I urgently wanted my bank cards and chequebooks to reflect my new name.

When I arrived, I asked for privacy as I explained to the customer service person that I had a name change but it wasn't a conventional one. I said I had a deed poll, and that I was undergoing a gender transition from Female to Male and this is why I'd changed my name.

To my surprise things moved to a more personal nature. The customer service representative was clearly feeling awkward and possibly hadn't encountered this professionally before. Their first response was "but you don't look like a man" followed by asking me if my family spoke to me, did I still have friends and did I have a relationship, adding to that "I couldn't go out with someone who used to be a woman".

I felt really exposed, and given the open plan nature of the spaces, people were looking at me and I felt this conversation crossed many personal and professional boundaries. It was also humiliating to feel people were now staring at me and I was being reduced to being a 'thing' or someone that was being othered because of a lack of staff training and ignorance.

I went home and I composed a very strongly worded letter, placing an emphasis on why privacy matters - as it's not just on the basis of someone transitioning but people want privacy when discussing a bank account for a variety of reasons. I also pointed out that there should be compulsory training for customer facing staff members, as a bank is one of the first places a trans person will go to when they've changed their name.

LENG

After a series of experiences with the NHS that left my confidence shaken, I was wary of meeting the surgeon who would be performing my hysterectomy.

I had previously navigated gynaecology screenings and cancer services as a trans man who is seven years on testosterone and had been turned away from appointments or been denied being passed to the right department on the phone because I sounded male – and obviously men don't have wombs.

It was with delight that I met my surgeon at a local hospital and was so relieved that I was going to be undergoing this invasive, intense surgical procedure with her. Not only did she ask me what my needs were in terms of having a bed (we managed to get a separate room sorted on the gynae surgery unit) and disclosing the nature of my surgery to my employer (she stated outright that she would not reveal any information about the nature of my surgery on sickness notes), but she understood that this was an important, life changing moment, and also terrifying to me as a trans person.

I was able to discuss my fears about my care after the surgery and she told me my nurses (who would be changing my dressings and dealing with my catheter) would be informed and that me being trans wouldn't be an issue. I would have been in a lot more distress had she not been there by my side.

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COMMUNICATION, INTERACTION AND PHYSICAL SPACES

You should think about all the ways in which your employees communicate with the public in order to make them trans inclusive.

The easiest rule that everyone should follow is not assuming anyone's gender based on their voice, physical characteristics and gender expression. If you are unsure of someone's preferred pronouns, use "they" until you have clarification. It may also be appropriate to ask someone their preferred pronouns.

EMAIL

Avoid gendered greetings in emails, such as 'Dear Sir/Madam' or using pronouns if you don't know how someone would choose to be referred to. The easiest way to do this is to simply use the individual's first name as a greeting and a gender neutral pronoun. This will ensure no one is misgendered and the email will be more personal.

PHONE

When talking on the phone, staff should be careful to avoid assuming someone's gender from the tone and pitch of their voice. This will help to avoid the use of incorrect pronouns (for example, referring to 'he' or 'she' by mistake) or incidents where members of staff refuse to believe the person is who they say they are, which is direct discrimination.

- Train your staff who communicate with the public via phone to use gender neutral language and avoid saying 'he' or 'she', or even better, to simply refer to the person by their name
- Train your staff in the policy of your organisation around supplying verification details
- Train your staff in avoiding making assumptions about people's gender from the tone or pitch of their voice

FACE-TO-FACE

Direct discrimination and abuse can occur in any form of communication, but can be particularly prevalent when face-to-face. As with all other forms of communication, your frontline staff should be trained to avoid using gendered language and making assumptions. Staff should not assume someone's gender by looking at them.

PHYSICAL SPACE AND FACILITIES

For more information on toilets and facilities, please see the fourth resource in this series. Customers and service users should be allowed access to any facilities of the gender they self-identify with. Where possible, gender neutral facilities should also be made available. Staff should be aware and always assume people will make use of the facilities which align with their gender.

Generally speaking I have had a positive experience of services, however as a transgender woman with a deep voice, phone based services can at times be problematic.

It is not uncommon for me to be misgendered by service providers such as my bank, phone company, airlines etc. For the most part I understand where the confusion comes from, and a quick explanation from me that I am transgender is usually sufficient to allow us to move on. However there have been incidences where my bank has refused to believe that I was myself and forced me to go through lengthy additional security questions in order to prove my identity. As much as I try to remain pragmatic, it does dent my confidence and it can be wearing to be constantly reminded that the world doesn't always see me as the woman I am. It would be nice if phone-based service providers could deliver a simple piece of training to instruct operators not to base identity by their expectations of someone's voice.

HANNAH

I am non-binary but I read as male; however, I wear clothes from the women's section in shops.

I was in a well-known high street store in Central London and had picked out some feminine clothes from the women's section. Because of my physical appearance, I was queuing up to use the men's changing room to try these on. As I approached the front of the queue after a very long wait, the customer service assistant stopped me and looked through my clothes in front of all of the men behind me and said pointedly 'you're not allowed to try these on here'. I was too ashamed and embarrassed to ask him what I was meant to do, so I walked back and put the clothes back on the rails and left the shop without buying anything. I have never tried on women's clothes in men's changing rooms since.

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TRAINING FRONTLINE STAFF

The key to trans inclusive service delivery and customer service is to ensure that all front-line staff and those who deal with service users and customers are well trained in treating people with dignity and respect.

Most often staff make mistakes because they're not sure or don't know, rather than because they mean to be offensive, and this can be easily resolved with training.

TRANS INCLUSION TRAINING FOR STAFF SHOULD FOCUS ON:

- Organisational policy and procedures where gender information is collected
- How to avoid making assumptions about gender in different mediums of communication
- How to use gender-neutral pronouns
- Examples of transphobia and equipping members of staff on to deal with it
- The business benefits of trans inclusive service delivery and customer service

COMMUNICATING WITH THOSE WHO DON'T HAVE COMPUTERS

Another barrier some organisations may face in training staff is a lack of access to computers and a work email address, for example those who work in construction or isolated locations.

In this setting, you should consider visible and physical ways to create and share messages; this could include posters and staff handbooks. You should also embed trans inclusion training within your current customer service/service user training for all staff.

EDUCATING A DISPERSED WORKFORCE

Many organisations have a dispersed workforce throughout Britain and in some cases the world.

This can particularly affect the retail, financial and fast moving consumer goods industries which may have a large number of branches, each with varying numbers of staff. In addition to getting the content of the training correct, you should focus on how you can cascade training across all staff at each level within each store, for example through utilising effective e-learning platforms.

USING OUTSOURCED OR AGENCY STAFF

Many organisations outsource services to different providers, for example call centre staff and security staff.

You should work closely with suppliers to ensure the standards you wish to maintain around trans inclusion are upheld. This could include doing joint diversity and inclusion training which include barriers to access for trans people or supplying them with/ sharing your own diversity and inclusion training. Employees who belong to suppliers still reflect on your organisation, play a part in ensuring service delivery or customer service is trans inclusive and can make or break your reputation.

PUBLIC AND THIRD SECTOR SERVICE DELIVERY

Under the Equality Act 2010, public sector organisations have a specific duty to ensure that all services delivered are accessible to those 'proposing to undergo, are undergoing or have undergone gender reassignment'.

As this is a narrow definition of what it means to be trans and does not encompass the whole community, you should extend this and consider all trans people when thinking about barriers to accessing your services. For more information about the law, see the first resource in this series.

SERVICE USER CONSULTATION AND MONITORING FEEDBACK

You should consult with your trans service users in order to get direct feedback around barriers and issues in service provision. Many public sector organisations now have service user panels which periodically scrutinise practice. If your organisation has one of these panels, you should ensure you have trans representation.

Consulting with the trans community will enable you to tailor your service provision accordingly. If any service users are transitioning, you should ask them how you can support them best through the touch points with your service.

PROMOTING YOUR SERVICES

Once you have ensured your services are trans inclusive, you should promote your services as such.

Examples:

- Visibly signal commitment in any spaces services users might access with the trans flag stickers or signs
- Where appropriate in any information which is provided in leaflets, booklets or online, tailor content to show how services are trans inclusive

SERVICE USER POLICIES OR GUIDANCE

If appropriate, you should have a service user policy or guidance which is separate to your staff policy. This should cover everything which may be specific to trans service users, such as the provision of facilities, processes and procedures.

CASE STUDY: ACTION FOR CHILDREN

At Action for Children, we have concentrated most of our LGBT work on our staff and volunteers.

We have a very active LGBT staff network, but we were aware we really needed to develop our work for LGBT children and young people. A number of years ago, we produced a publication in partnership with Mermaids, which looked at what life was like for children and young people who identified as trans but we also knew this needed refreshing due to developing terminology for trans children and young people.

The new guide, Supporting Trans Children and Young People, was developed with the original Mermaids publication in mind and more recent publications that are widely available to all organisations. It was important to include case studies from children and young people who access Action for Children's services, and draw from the experience of our inclusion champions who often work directly in services.

Once written, the guide was shared with our inclusion champions and members of the LGBT staff network, Celebrate, for feedback. It will be shared with all staff and be available on Action for Children's website. Feedback has been excellent, with staff advising that the guide will be really helpful.

It is really important that this guide supports staff and volunteers to make services as inclusive as possible. We have produced a useful poster about gender identities to accompany the guide, which we hope will help increase awareness amongst our staff and volunteers.

Mermaids – mermaidsuk.org.uk

Mermaids provides support for families and children with gender identity issues.



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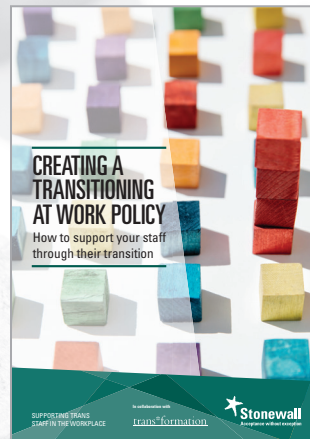
How to ensure your service delivery or customer service is trans inclusive



1. First steps to trans inclusion – an introduction to trans inclusion in the workplace.



2. Communicating commitment to trans inclusion – the trans inclusion journey and communicating commitment to all staff.



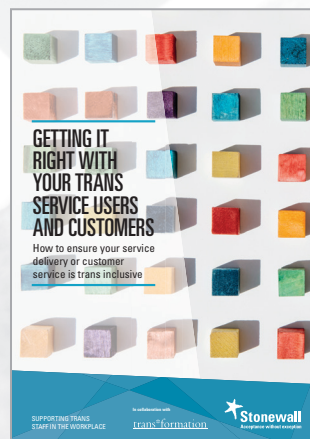
3. Creating a transitioning at work policy – how to support your staff through their transition.



4. Trans inclusive policies and benefits – how to ensure your policies and benefits are trans inclusive.



5. Engaging all staff in trans inclusion – how to engage all levels of staff in the trans inclusion journey.



6. Getting it right with your trans service users and customers – how to ensure your service delivery or customer service is trans inclusive.