

The MONEY Charity

Our Work with Industry

The Money Charity has a long history of working with the financial services and credit industries. We believe that constructive two-way partnerships between ourselves and the industry can produce many benefits for all concerned.



Our work with the commercial sector falls in to three main categories:

Helping you achieve **better outcomes** for your customers;

Helping you **improve the financial capability** of your customers and staff;

Providing opportunities for you and your staff to **improve the financial capability of others.**

Better processes to connect with customers

We can offer a unique perspective on your current methods of engagement with your customers. By using our extensive knowledge of the UK population and the way in which they interact with their money (or in many cases try to avoid dealing with their finances), we can help you create more constructive communication with your customers.

We provide an independent standpoint that will help you better understand your customers and their needs. By working with you and being mindful of the commercial and regulatory pressures that you are under, our suggestions are good for your customers and your business.

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Our **Customer Journey Evaluation** takes a look at collections operations and gives you a view as to how the various elements will impact your customers. The exact terms of a CJE would be agreed between us, but is likely to incorporate a review of existing procedures, documentation and some call listening. We would feed back to you our observations/recommendations in the form most appropriate for your business.

We can also help **build tailored financial capability products** for your customers.

Improving the financial capability of customers and staff

As an organisation, showing responsibility for your customers and that you have an interest in their financial wellbeing can only be a positive from a reputational perspective.

Financially capable consumers are better customers. We can help you identify your customers' needs and identify the most appropriate solution to address them. Whether that is digital content, videos, or webinars on your website, or tailored printed material for you to hand out in store, we can help you work out the best options for you and how to implement them.

We also offer workshops to improve the financial skills and capability of your staff. See the **Hosting Our Workshops for Adults'** factsheet for more information.

Improving the financial capability of others

We think that what we do is unique and valuable – but it's only possible if we have funding for it! There are many ways of becoming involved with The Money Charity more broadly and helping us carry on what we do; this could be a donation, or a working relationship that matches our expertise with your needs. We would love to hear from you.

If any of this might be of interest, please do not hesitate to get in touch about our Adult & Industry programmes to discuss further - Hello@themoneycharity.org.uk

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