ALAMEDA-CONTRA COSTA TRANSIT DISTRICT

STAFF REPORT

MEETING DATE: 4/26/2023	**Staff Report No.** 23-225

TO: **AC Transit Board of Directors**

FROM: **Michael A. Hursh, General Manager/Chief Executive Officer**

SUBJECT: **Customer Services Feedback**

BRIEFING ITEM

AGENDA PLANNING REQUEST: ☒

RECOMMENDED ACTION(S):

Consider receiving a report on customer feedback channels, methodology, and implementation. [Requested by Director Walsh on 11/9/2022]

Staff Contact:
Beverly Greene, Executive Director of External Affairs, Marketing & Communications

STRATEGIC IMPORTANCE:

Goal - Convenient and Reliable Service
Initiative - Service Quality

Timely and comprehensive responses to captured customer feedback is a critical component in providing a quality service offering and better ensuring a positive customer and rider experience.

BUDGETARY/FISCAL IMPACT:

There is no fiscal impact in this briefing report.

BACKGROUND/RATIONALE:

The Customer Relations System (CusRel)

The current Customer Relations system ("CusRel") is a customer feedback database developed by the IT department in 2015 in conjunction with the Customer Service team as a replacement for a decades-old system. Customers can provide feedback to AC Transit in any number of ways, as shown in Attachment 1(A), but feedback is only input directly into the CusRel system through three channels-- the Customer Service Call Center, the AC Transit official mobile app, and via the AC Transit website. Additionally, 200 AC Transit staff members have access to CusRel, and can enter feedback received from other sources - like through their District email or phone - directly into CusRel. Complaints on social media, for instance, can be entered by any of the Social Media team; emails sent directly to staff can be entered by those who have access. Those without access can forward emails and phone messages to the Customer Service team for input.

Customer feedback is categorized into one of 44 specific "Reason Codes", as shown in Attachment 1(B). Additionally, tickets can be marked with two additional indicators in CusRel: *ADA* and *Title VI*, further identifying the nature of the reported issue. Any ticket marked with the *Title VI* indicator automatically adds "Title VI" as a secondary Reason Code and is reviewed by the Title VI Program Manager.

Within each Reason Code there can be a variety of specific types of comments related to that larger category. For example, moving, removing, relocating, fixing, installing, and enhancing a bus stop are all included in the *Bus Stop* Reason Code. Within the *Routes & Schedules* Reason Code we see comments and questions about routing, frequency, and (lately) Line reinstatement. Previously, there were over seventy different Reason Codes, which often resulted in washed-out reporting data and confusion about which code to use for some tickets. During the implementation of the current CusRel system, the Customer Services team reviewed all the codes and consolidated and eliminated confusing and redundant codes.

General comments not related to a specific incident are also captured in CusRel, and the comments are forwarded to the department that oversees that issue. Currently, any required field (*Route, Direction of Travel, etc*.) can be populated with "n/a", thereby leaving the Customer Comments section for general feedback.

Distribution and Dispensation of CusRel Feedback

Based on a pre-determined set of rules developed by staff, the Call Center routes tickets to their respective department for research, action, and customer response. Feedback, which is entered into CusRel as "tickets," are worked individually, without consideration or visibility to other CusRel tickets, as the current system is not able to use software logic to identify potential feedback links. Different departments have different ways of processing CusRel tickets. The Transportation department, which receives the most customer feedback, processes CusRel tickets based on a Standard Operating Procedure (S.O.P.) that was developed in collaboration with Customer Service, Division Superintendents, and the Director of Transportation. This document describes the procedure for processing CusRel tickets, from Research to Customer Response. Customer Service is currently working on S.O.P.s for other departments to standardize CusRel ticket processing and dispensation.

AC Transit staff takes action on every CusRel ticket; someone researches the incident, comment or request, and all customers who request a response are contacted via their preferred method. When a specific answer to a specific question is available, it is relayed to the customer: *("The bus was a no-show due to a workforce issue"; "The City of Oakland installs and maintains bus shelters there"; "There are no immediate plans to reinstate the Z-line", etc.)* However, internal, disciplinary, HR-type actions are not recorded in CusRel, and customers are not notified about them. See Attachment 1(C).

CusRel also handles Lost & Found and Map/Timetable Requests, both of which are directed to the AC Transit & Clipper Customer Service Center, which manages the Lost and Found as well as mails out Timetables and System Maps by request. Neither of these ticket types are included in any metric presented herein.

 CusRel Limitations
The existing CusRel system has some inherent limitations that create unreliable or inaccurate data and prevent

comprehensive analysis of feedback received.

Most of the fields on the website and mobile site are free form, meaning that users and customers can enter any information without having to choose from a predetermined set of data. Riders do not choose, for example, from a list of routes/lines when submitting a complaint. Rather, they can enter any numbers or letters or combination thereof. Nor do customers select from a list of Boarding Locations or Direction of Travel; riders can enter anything in these fields. Because of this, staff sometimes receives incorrect or missing information. The Customer Service staff cleans-up some of the inaccurate data: Stop ID numbers, Direction of Travel, Line number, etc., and will request clarification from customers, but often do not get a response, or the response is still not clear.

CusRel operates as a stand-alone application. Aside from auto-populating a customer's email address in Outlook, CusRel is not integrated with any other system or database used by AC Transit. CusRel feedback is separate from any other internal system, and therefore cannot be combined with other data systems to identify actual trends in feedback or service issues.

Additionally, CusRel is a record of what was *reported*, not what actually happened. Some tickets are incorrectly reported (wrong coach number, operator description, line number, date, etc.). Some riders' perceptions are inaccurate: they believe the bus was late, but it was really a no-show, and vice-versa. They say they were passed up, but they were not at a bus stop, or a different route/line passed them up, or an out of service bus passed them up, and these inaccuracies are sometimes discovered during the investigation of the reported feedback. We do not change the Reason Code after the investigation because this is a record of *what was reported*, not what happened, although the investigation results are noted in the ticket's free form comment area.

The number of complaints for any given line or reason (code) is often not enough to make a valuable correlation to actual service issues. Although feedback from our customers is incredibly important to resolve, the number of complaints versus our total ridership is actually very low-in 2022, we received on average 24 complaints per every 100,000 boardings. Finally, as seen in Attachments 1(D) and E, complaints within a Reason Code are typically spread relatively equal across all lines, dates, and time of day, and do not form an identified pattern tied to a specific reason.

Reporting of Feedback

The reporting of data is typically done in a summary of feedback categories presented to and discussed at the first monthly meeting of the Service Planning and Operations Committee ("SPOC"). This report is also posted to the internal Sharepoint/MYACT site on the Customer Service page. Additionally, ad hoc reports are created and provided to staff with more focused or specific requests (when the requested data is available).

Current, regular reports show how many comments in each reason code are received in the prior month. Long-term reports can also show this same data, which illustrate trends in *types* of comments. Reason codes are also grouped informally by general categories: Driver-related, Service, Infrastructure, and Information. A few, outlier-type codes are grouped as "Other".

A monthly report of Division staff's production levels is distributed to the Department Directors and Executive Leadership. Also provided is a summary report of Operator-related complaints, showing the number of each type of complaint for the month.

Although customer feedback is received for several AC Transit departments, the majority of customer comments are directed to the Planning and Transportation Departments, so a closer look at how feedback is incorporated in these two departments is warranted.

Planning

The Planning department has six Planners who use feedback for internal reports and improvements and/or changes to service. One member of the team reviews every comment that comes into CusRel for the Accessible Services, Bus Stops, Planning, Scheduling, and School Trip Manager departments. All tickets are reviewed for correct information, (updating missing route number, bus stop ID, etc.) and answered with immediately available information. Every suggestion/complaint is then sent via email to its respective area Planner for review and to see if any additional information can be shared with the customer. If so, a second response is sent via the customer's preferred method. The Planning department often works collaboratively with other departments to gather information and find solutions to customer feedback. Planning uses this information to make changes to routes, schedules, bus stops, and can even lead to policy changes.

Transportation

The Transportation team is comprised of eleven Superintendents and Assistant Superintendents, and five Supervisors who all use CusRel to mitigate operator-related issues such as pass ups, earlies, lates (both operator error and scheduling), operator conduct, and hazardous driving. Internal investigation methods include reviewing video from coaches, speaking with and coaching operators, and taking appropriate actions that may lead to additional training or discipline.

Monthly report data from Customer Service and internal sources are used to influence changes and improves to procedures, policies, and training by emphasizing which service aspects to concentrate on. Within the department, feedback is shared via monthly SPOC meetings, Service Bulletins, and reports generated by the Customer Relations team. Additionally, Transportation staff routinely share feedback information with several departments, including Scheduling, Planning, Training, IT, Supervision, and Accident Investigation.

Each Operating Division processes approximately 300-400 customer contacts per month. CusRel is the direct link between the customer and Division staff. Complaints, Commendations, suggestions, Group Movements, and general feedback is reviewed and acted upon by the Transportation Team, who researches each complaint, responds back to the customers, interviews Operators, and pulls video as a direct result of individual feedback. The intel gathered in these investigations are used to determine what actually happened and then take steps to improve or correct the situation.

Customer Feedback Next Steps

While there are a number of limitations and challenges in providing comprehensive feedback analysis within

the current infrastructure, staff has still identified ways to leverage our existing system and prepare for a more responsive infrastructure in the future.

The District, led by the IT department, is in the preliminary stages of procuring a new enterprise-wide Customer Relationship Management (CRM) system. The scope of work and capabilities of a new system is currently being assessed. Staff has estimated the cost of the CRM software replacement to be between $900,000 to $1.1 million. Staff is diligently searching for funding for the CRM and has yet to identify a source for its funding at this time.

The enterprise CRM system is anticipated to provide the following CusRel improvements:

- Adding subcategories that more clearly identify the nature of the feedback
- Improvements and clarity for the online feedback forms, with separate forms for General Feedback, Commendations, Complaints, Lost & Found, Map Requests
- Auto-routing of some types of tickets (e.g.: Signage comments might go directly to the Pole Crew and/or Communications)
- Integration with some other internal AC Transit systems
- Capturing other customer relationships within the District
- Improved reporting and advanced analytics capabilities, that would allow for identifying trends in not only types of feedback but also patterns in locations, times, bus lines, operators, and geographical areas for any given Reason Code.

Additionally, the Customer Service team is also exploring new options for the distribution and tracking of feedback data with the existing infrastructure within the District, including working more closely with the Business Sciences team to identify opportunities for deeper dives into the CusRel system. Staff would create some new reports to illustrate areas of opportunity for operator training, infrastructure improvement, and Planning & Scheduling changes. Staff has also worked with the Customer Service Call Center to request that callers respond to customer satisfaction questions at the end of the call. And as mentioned earlier, Customer Services staff will be developing S.O.P.s with selected departments to standardize and streamline the intake, distribution, and dispensation of CusRel information within each department. These S.O.P.s will help to ensure that all feedback of a certain type is handled the same way, which will result in more consistent data for regular reporting. The District's upcoming Customer Satisfaction Survey will also provide insight into opportunities to improve our feedback process.

ADVANTAGES/DISADVANTAGES:

This is a briefing staff report- there are no advantages or disadvantages to this report.

ALTERNATIVES ANALYSIS:

There is no alternatives analysis provided in this briefing report.

PRIOR RELEVANT BOARD ACTION/POLICIES:

Board Policy 421- Customer Contact Policy

ATTACHMENTS:

1.   Customer Services Charts A-E
2.   Operator Complaints by Division 2022
3.   CusRel Productivity 2022

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