Regional TAP Integration

Ad Hoc Customer Experience Committee

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tap

What's next for TAP

- Building a hybrid account based system with Salesforce
- Interfaces with numerous programs
- Unified Customer Service
- Allows unbanked to participate in programs
- Provides discounts across programs
- Offers customizable rewards
- Incentivizes behaviors
- Event "flash pass" capabilities
- Account loading choices

Additional TAP initiatives

- Transfer on 2nd boarding
- Retail gifts cards
- Stored Value on bus
- Token transition to TAP
- Wearables
- Regional TVMs
- TVM screen upgrades
- Fare media equipment upgrades

Gift Card > Programs

< Ride-Hailing Services

^Bike Share

TAPforce

^Mobility Hubs

Fare Subsidy ^ Programs

^EV Car-sharing

<Parking

Mobile App, Bikeshare, Fare Subsidy and Retail Fare Sales Software

- Ability to load a card by tapping your phone in Phase 1
- Ability to use phone as TAP card in Phase 2
- Includes flash pass and bar code for events such as NFL games
- Integrates with all account-based programs such as Bikeshare, Fare Subsidy Programs, EV Car-Share, Via, Expresslanes,
- Fare subsidy programs (LIFE) no longer has to use paper coupons
- Next-bus and Next-rail capabilities
- Trip-planner
- Rewards
- Discounts
- TAP vendor locator
- Notifications and alerts
- Geo-location
- Shared revenue model for advertising

Gives access to the unbanked

- Access to programs previously out of reach
- Options to load cash (Drug Stores and TVMs)
- Mobile access to all programs
  - 70% have smart phones instead of computers

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REACHING THE UNBANKED & UNDERBANKED

Offer rewards: Let patron choose

REWARDS POINTS
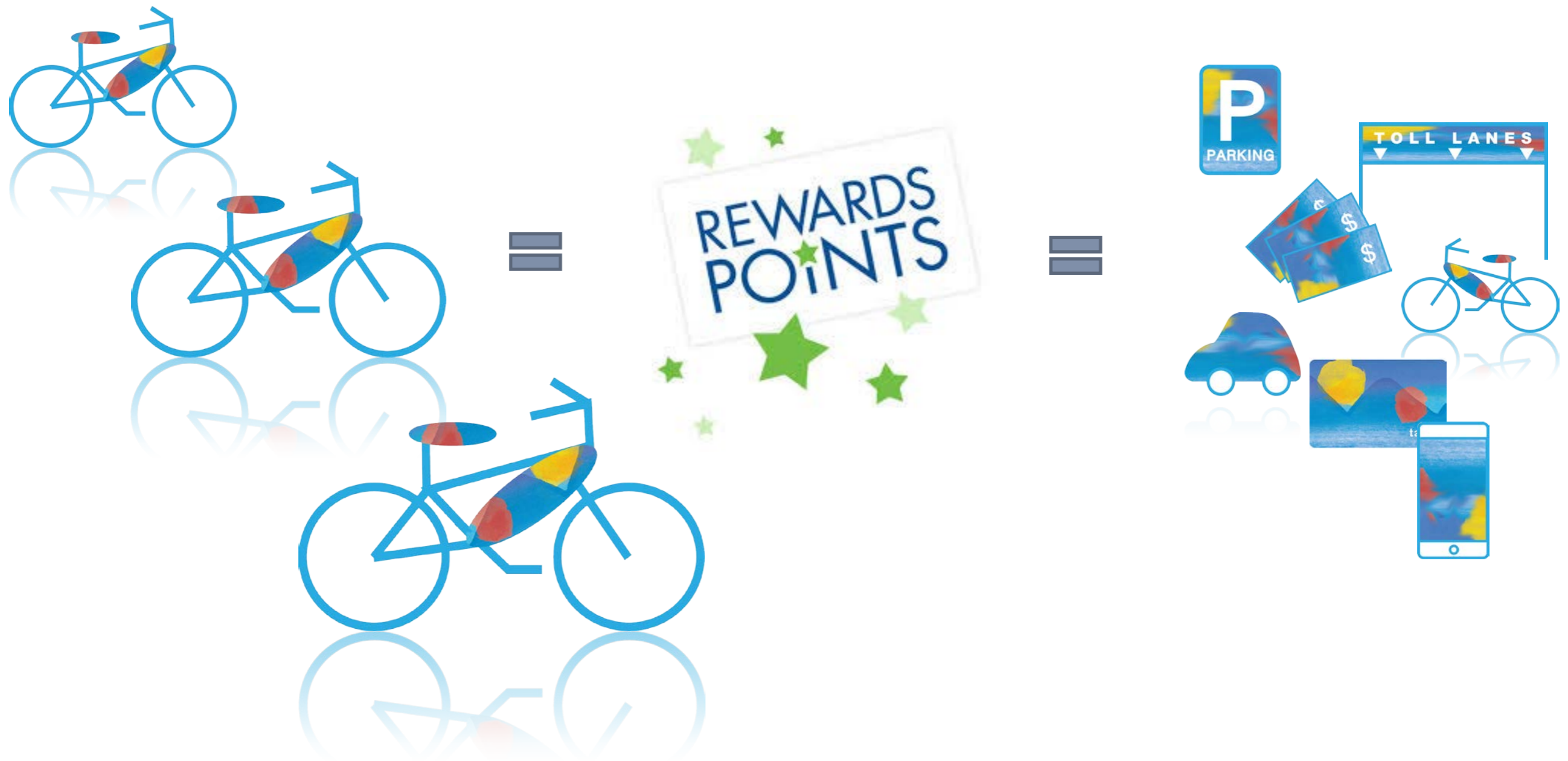
Modern Account Loading Possibilities: Gets Cash Out of the System
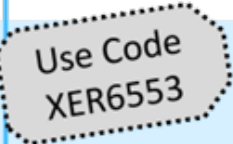
Can TAP expand to pay for things beyond transit like Octopus card?

- Octopus: Hong Kong's transit card that also works in retail chains and restaurants
  - Hong Kong is nimble with a government that can mandate retail integration
  - US retail cards currently not compatible with Octopus concept

- We **are** building our account based system so that future open payment may be easily adapted, similar to Octopus

Cross Program Account Relationships

	Programs				
Programs	(bike)	(bus) (train)	Metro ExpressLanes	(P)	Share it
Membership - Level				Monthly	Monthly
Products	Flex Monthly $	Metro 30 Day Foothill Day $	$	$	$
Group Discounts	Senior, Low-Income	Sr65, Disabled, Low-Income, Student K-12	Low-Income, AARP, AAA	AAA	Sr60
Earn / Rewards / Redeem	☆ ☆ ☆ 🚲 x 5 = 🚆	☆ ☆ 🚆 x 50 = 🚌	I-110 x 16 = $5	☆ (P) x 30 = (P)	☆ ☆ ☆ share x 20 = share

Benefits

Badges: (🚲 x 10) + 🚆 + 🚌 = ⭐1   ⭐1 + ⭐1 = 🔵2   Environmentalist Level 2

Promo Codes	(QR) ≡ 🚲	PROMO ≡ 🚌	Refer Friends and Family = $10 credit		Use Code XER6553 ≡ share
Trust Level	Trust Increase Min. Balance Decrease	"Super-Pass" loaded to select TAP Card	Trust Increase Min. Balance Decrease	Program doesn't use	Trust Increase Min. Balance Decrease

Timeline for account-based functions

	2017				2018										

New Check-out, Credit Card Storing, PCI Improvement, Photo-crop for Reduced Fare Applications, MUNI News Feeds — Early Release

Design/Build Discounts, Web Navigation, Bike Share, LIFE Program Discounts, Personalized Pricing, Payment Options

Bike Share, Web Navigation, LIFE Program Discounts, Personalized Pricing, Payment Options Test/Train/Pilot — Major Release — **Add Additional Programs (VIA, Micro-transit, Electric Vehicle Car Sharing)**

Design/Build Other Discounts Programs, Auto-replenish TAP Wallet, Combined Accounts

Other Discounts Programs, Auto-replenish, Combined Accounts Test/Train /Pilot — Update Release

Design/Build Settlement, Rewards, Inventory Management

Settlement, Rewards Test/Train/Pilot — Update 2 Release

TAPforce and Nextfare Design Patron Mobile App

Focus /Sample Group Testing Patron Mobile App — Beta Test — **Mobile App Public Beta Test/Pilot** — App Release Public — **Mobile Operations**

TAPforce and Nextfare Design RPOS Device Software

Build/Integration/Lab Test RPOS Integration — Beta Test — **RPOS Device Beta Test** — RPOS Release — **Third Party Vendor Roll-out**

2017
9 10 11 12

2018
1 2 3 4 5 6 7 8 9 10 11 12

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