

**Board Report**

File #: 2020-0683, **File Type:** Plan**Agenda Number:** 20.

**OPERATIONS, SAFETY & CUSTOMER EXPERIENCE COMMITTEE
NOVEMBER 19, 2020****SUBJECT: 2020 CUSTOMER EXPERIENCE PLAN****ACTION: APPROVE RECOMMENDATION****RECOMMENDATION**

ADOPT the 2020 Customer Experience Plan.

ISSUE

Customer experience is the sum total of experiences Metro customers have at every step of their journey. Metro's goal is to minimize pain points, maximize smooth, uneventful experiences, and find opportunities for occasional surprise and delight.

In June 2018, the Metro Board of Directors (Board) approved Motion 38.1 (Attachment B), requesting that Metro staff develop an annual customer experience plan. In February 2019, staff submitted a report on Motion 38.1 to the Operations, Safety and Customer Experience Committee (Attachment C) outlining steps to align annual customer experience plans with Metro's *Vision 2028 Strategic Plan* Goal 2, which calls on Metro to "deliver outstanding trip experiences for all users of the transportation system." Metro's first Customer Experience Plan is attached (Attachment A).

BACKGROUND

Development of Metro's first Customer Experience (CX) Plan started with the hiring of the first Executive Officer for Customer Experience in April 2020. The 2020 CX Plan was developed on a compressed schedule, and its recommendations were developed in response to social media comments, customer survey results (including a June 2020 survey to obtain feedback from customers during the COVID-19 pandemic), and interviews and discussions with individuals ranging from Board members and staff to bus operators.

Looking forward, staff plans to also collaborate with Metro advisory committees and community-based organizations, to review and improve customer experience as a continuous process, and to issue annual reports.

The purpose of the 2020 CX Plan is to take an honest look at pain points riders tell us about, and to make improvements that are responsive to those issues. The Plan examines ten areas for improvement, ranging from service reliability to how Metro addresses homelessness. The Plan

makes recommendations which will become action items following Board adoption of this report, and proposes Key Performance Indicators (KPIs).

DISCUSSION

The following vision guides development of Metro's customer experience plans: "Our goal is to always put you first - your safety, your time, your comfort, and your peace of mind - when we connect you to people and places that matter to you."

Initiative 2.3 of Vision 2028 commits Metro to dedicate staff resources to develop a comprehensive approach to improve customer experiences. Vision 2028 goes on to describe the following specific initiatives:

- Develop a unifying vision and strategy for enhancing customer experience
- Improve customer journey and touch points, and
- Use data analytics to benchmark and measure system performance in meeting customer satisfaction targets.

Metro's first Customer Experience Plan focuses on fundamental aspects of service to provide customers with a reliable, safe, and comfortable experience. As these fundamentals get better, Metro can shift its attention in future plans to tackle additional areas for improvement, as well as go the extra mile to surprise and delight customers in a way that distinguishes the Metro brand.

Key Performance Indicators

To develop Key Performance Indicators (KPI's), staff considered seven stages of the customer journey, from planning a trip to getting from the bus or train to the final destination. Based on this assessment, staff created a new, statistically sound, random sample survey (called the Customer Experience Survey) that asks customers to rate 40 aspects of service. The first survey was conducted in October 2020. Results are currently being processed and will be used to inform budget priorities as well as the 2021 Customer Experience Plan.

FINANCIAL IMPACT

The cost of Customer Experience Plan initiatives will be considered relative to other Metro priorities, and approved during Metro budget processes, and the survey referenced above will help inform budget priorities.

IMPLEMENTATION OF STRATEGIC PLAN GOALS

This 2020 Customer Experience Plan supports strategic plan Goal 2, "Deliver outstanding trip experiences for all users of the transportation system."

NEXT STEPS

Upon adoption of this report by the Metro Board of Directors, staff will work with business units throughout Metro to implement action items subject to funding availability. Staff will also begin

development of a 2021 Plan, which will include a focus on organizational culture, and on the needs of specific categories of riders such as people with disabilities, non-English speakers, people without smartphones, women and girls, youth, and senior citizens. Staff will collaborate with Metro advisory committees and community-based organizations in these future efforts. Lastly, staff will complete graphic design of the 2020 CX Plan and release a final edition.

ATTACHMENTS

Attachment A - 2020 Customer Experience Plan

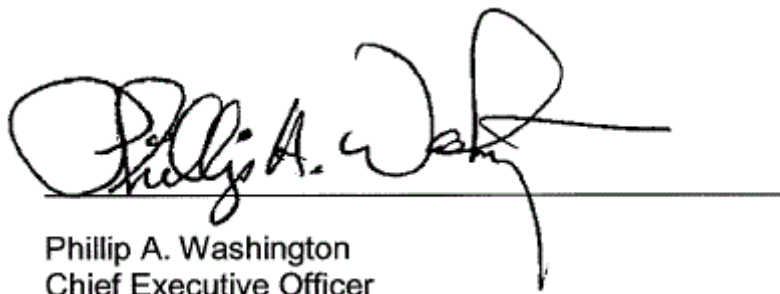
Attachment B - Motion 38.1 NextGen Bus Study Service Parameters

Attachment C - Customer Experience Motion 38.1 Response

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