Customer Experience

Overview & Strategy 2023

Our Building Blocks

Existing Customers

CX owns Customer Communications within the **'paid area.'**

We strive to exceed expectations and bring moments of **surprise & delight.**

Rider Input

CX actively engages with riders to **address concerns** to **enhance the experience**.

We analyze customer feedback & data for actionable insights and provide periodic reports.

Customer Journey

From websites and maps to payment experiences and mobile apps, we view every touchpoint to **ensure a seamless and frictionless journey** for our passengers.

Partnerships

We **partner** with regional transit agencies, advisory boards, and communities to enhance Caltrain, focusing on **customer retention and increased ridership.** Unite the org around the customer.

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The Importance of Customer Experience Strategy

Customer Experience: By the Numbers

Customer Service Contacts

3500

We average 3500+ Caltrain customer calls a month. We prioritize personalized, attentive service.

Communication Collateral Pieces

150

We average 150 pieces of station signage designed monthly. Station wayfinding, flyers, bus bridge signage and more. Ensure timely, clear, visible information.

Outreach Hours

450

We average 450 hours a month of community outreach via our Ambassador Program. Assisting travelers, informing the public and building connections.

Support Miles Driven

350

Distribution delivers across 3 counties- delivering signage, timetables, map, notices and more. Sets up station signage to ensure riders are well informed.

Ticket Sales

$42k

We support communities, families, and schools with ticket booth sales and group ticket sales to make a seamless, enjoyable experience.

Current Customer Sentiment

2023 Customer Satisfaction Survey showed 78% are satisfied with Caltrain.

Our 2023 rider and non-rider focus group research reflects a positive sentiment for Caltrain, and a strong feeling of safety onboard. Other key take-aways from the research:

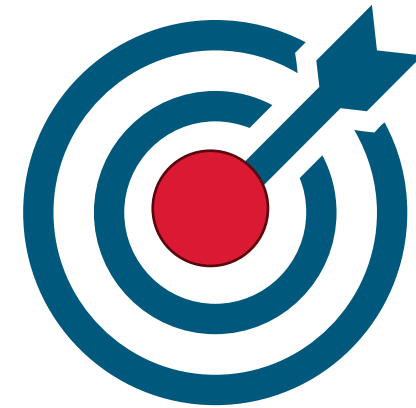| Strong feeling of safety onboard the train | Desire for more "life" at stations | Challenges navigating the Caltrain system | Where can Caltrain take me? |

Elevating the Customer Experience

Challenges and Opportunities

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CX Direction: Unveiling Customer Trends and Preferences

89% Need strong **multi-channel** support [live chat, email, phone, chat bot].

At the heart of our strategy, **customer preferences** take center stage.

70% Expect a company's website to include a **self-service help app.**

60% of customers **change their contact channel** depending on where they are and what they're doing.

90% Say they've had poor experiences seeking **customer support on mobile.**

89% Of relationship will be **managed without interacting with a human** by 2024.

Source: Invesp, Gartner, Aberdeen, Accenture

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Electrification and Customer Experience

Concluded series of **three focus groups** (June 2023) that interviewed current, infrequent, and lapsed riders:

Early analysis indicates a variety of problems solved by electrification

- Frequency of Service
- Cleanliness
- Wi-Fi

A high-ranking desire from focus groups was to improve the "sterility" of stations to improve the station experience.

Caltrain Electrification is about to revolutionize the way customers ride, offering speedier, more frequent service without sacrificing the reliability they love.

Now we can focus on electrification awareness and improving other facets of the customer journey.

FIRST CLASS SERVICE

STATE-OF-THE-ART VEHICLES FOR SMOOTHER RIDES
Free Wi-Fi, outlets at every seat, spacious accessible bathrooms, and digital displays with trip information

RIDE MORE, WAIT LESS

TRAINS EVERY 30 MINUTES ON WEEKENDS
Compared to hourly service today

TRAINS EVERY 30 MINUTES DURING MID-DAY AND EVENINGS
Compared to hourly service at most stations today

TRAINS EVERY 15 TO 20 MINUTES DURING PEAK HOURS* AT 16 STATIONS
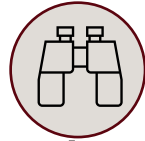Compared to 7 stations today

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The Customer Journey | CX Perspective

We see the customer journey having 5 main pillars. These pillars are at the heart of our strategy.

AWARENESS

- Caltrain services
- Places we go
- Promotions
- Fare Information
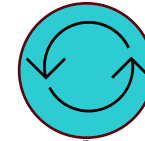- Equity initiatives
- Self-help

DISCOVERY

- Trip Planning
- Promotions
- Timetables
- Mobile apps
- Live maps
- Live support

RIDER EXPERIENCE

- Real-time alerts
- Ticket purchasing
- Parking
- Regional Wayfinding
- Facilities
- Trip information
- Quick help
- First & last mile experiences

RETENTION

- Satisfaction
- Repeat ridership
- Fast solutions
- Places we go

ADVOCACY

- Customer Satisfaction
- Loyalty
- Brand Recognition
- Community Trust

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Physical Improvements for Customers

**Station Cleanliness & Maintenance**

- Graffiti cleanup
- Station cleanliness assessment & improvements

Signage, Communication, and Outreach

- Improved wayfinding signage (Regional transit partnership)
- Pilot digital displays for multi-level station
- New Visual Message Signs (VMS) at platforms
- Electrification Outreach / Station Community Events

Potential Pilots*: Station Experience

- Pop up shops -or- Food trucks
- Beautification: Community Artist Mural
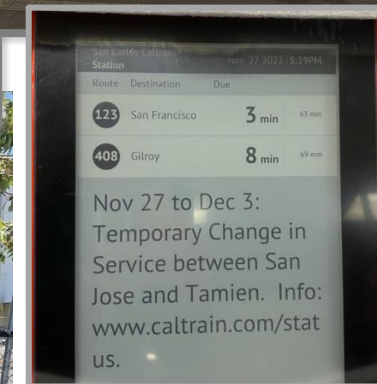
*Pilot potential still in discovery mode & would need approvals/ budget assessment

Digital Improvements

Customer Planning and Journey

- New Caltrain Real-Time Service Alerts: Text & Email

- Increased staffing to provide real-time alerts

- EMU: Power outlets, free Wi-Fi, digital passenger information system

- Potential for future regional MTC mobile app experience

Customer Service and Self-Help

- New Customer Service tool (CRM) to provide live chat and email for customer support
  - Self-help chat when customers are viewing Caltrain website or mobile app

- Customer Service view of Rail Operations Control System (ROCS) to support customers

Community Building and Feedback

- New 'Discord' social platform to engage customers and community
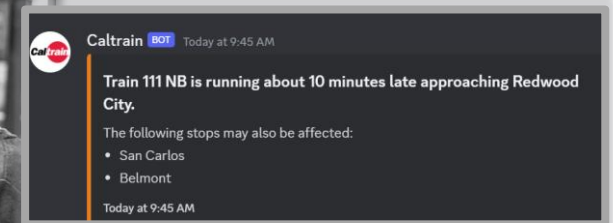
Timeline for Projects and Pilots

- Customer Service obtains ROCS for viewing train locations
- VMS Replacement Project Starts (2023-2024)
- Electric Train Outreach Events (San Jose / San Francisco)

- Electrification Outreach Events (San Mateo; Launch Events)
- Pilot Customer Service Tool (CRM) to fine tune for customer needs and efficiencies
- Digital Passenger Information System live on EMUs
- Continuing: 'Stations Team' work, participating in regional wayfinding efforts

Jul-Dec 2023

July-Dec 2024

Jan- Jun 2024

Jan-Jun 2025

- Stations Team assessments
- Graffiti Team expands
- Pilot Text & Email Service Alerts (Spring)
- Pilot Multi-Level Digital Displays (San Carlos)
- Launch Discord Social Meeting
- Additional Customer Service Training w/ ROCS
- Continuing: Replacing VMS, MTC regional wayfinding

- Launch live chat and email as customer service channels
- Launch self-help chat (via AI): Assists customers viewing Caltrain website or mobile app
- Launch metric-based reporting
- Launch Customer Satisfaction Survey for customers who contact the CS Team for support
- Continuing: 'Stations Team' work, participating in regional wayfinding efforts

Customer Acquisition Strategy
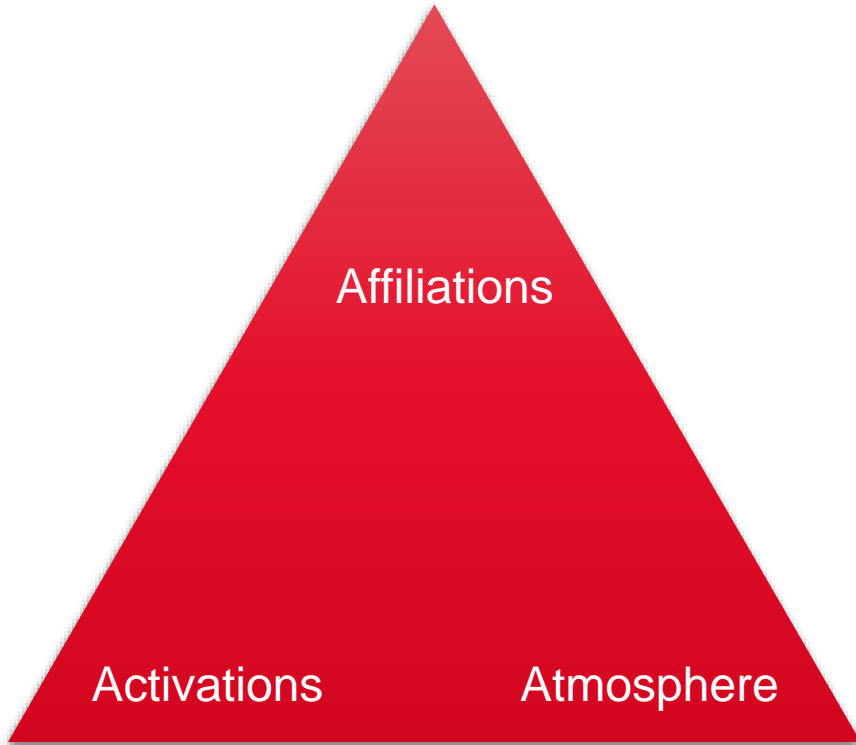
- **Affiliates:** Ridership growth through promotion of specific fare products to affiliates, i.e., partnerships with organizations that align with target consumer segments. Current efforts are focused on GoPass sales to businesses along the corridor.

- **Atmosphere:** Ridership growth through brand campaigns that situate Caltrain competitively and generate atmosphere. Current efforts include a marketing campaign highlighting destinations along the corridor, and electrification campaign generation.

- **Activations:** Ridership growth through creative activations of existing assets. Current efforts include potential events at stations for Bay FC and for electrification toward Q3 2024, with past events including Holiday Train and Portola Festival co-marketing.

- **All informed by internal and regional data.**

Key Initiatives

- Customer Appreciation at three stations (Summer 2023)
- Innocenti Strings Soloist at station (June 2023)
- San Mateo County Fair (June 2023)
- Pride / Chalk Muralist (June 2023)
- Coaster Campaign (July 2023)
- EMU Public Event ('23-'24)
- South County Service Promotion (Oct '23)
- New Fare Pilot Promo (thru Sept '24)
- Bike to Caltrain Campaign (April '24)
- Caltrain Store Soft Launch (Dec '23 – Jul '24)
- Clipper START at Caltrain (Jan '24)
- Explore Caltrain (Spring 2024)
- Bay FC Co-Marketing (March 2024)
- Electrification Campaign (2024)

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Thank You