

# Customer Experience

Overview & Strategy 2024



# 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.

# The Importance of Customer Experience Strategy



# Customer Experience: By the Numbers

Customer  
Service Contacts

Communication  
Collateral Pieces

Outreach  
Hours

Support Miles  
Driven

Ticket Sales

3500

150

450

350

\$42k

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

We create 150 pieces of collateral monthly. Station wayfinding, service updates, flyers, bus bridge signage and more. Ensure timely, clear, visible information.

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

Distribution delivers across 3 counties. We deliver timetables, notices & flyers. We set up events and station signage to ensure riders are well informed.

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



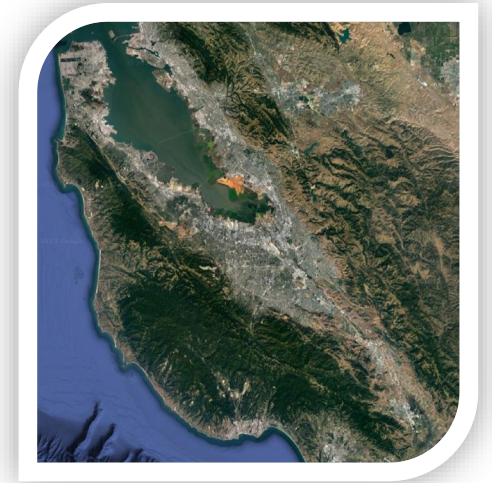
Desire for more "life" at stations



Challenges navigating the Caltrain system

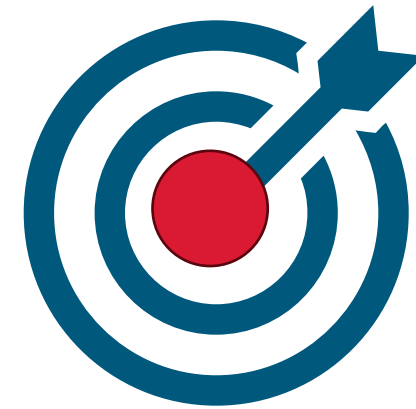


Where can Caltrain take me?



# Elevating the Customer Experience

Challenges and Opportunities



# 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



# 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





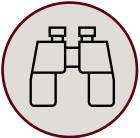
# The Customer Journey | CX Perspective

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



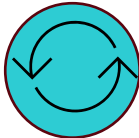
## DISCOVERY

- 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



# Physical Improvements for Customers

## Signage, Communication, and Outreach

- Improved wayfinding signage & maps (MTC Regional Partnership)
- Pilot digital displays for multi-level stations
- New Visual Message Signs (VMS) at platforms & new LED signs at Diridon
- Electrification Outreach & Station Community Events

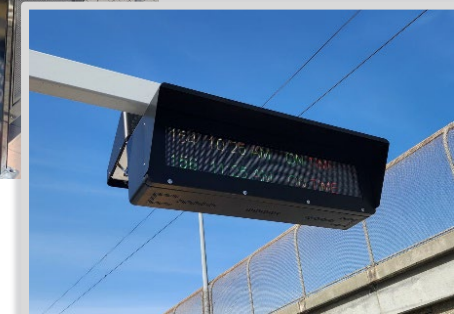
## Station Cleanliness & Maintenance

- Graffiti cleanup
- Station cleanliness assessment & improvements

## Potential Pilots\*: Station Experience

- Pop up shops -or- Food trucks
- Beautification: Community Artist Mural(s), temporary art installations

*\*Pilot potential still in discovery mode & would need approvals/ budget assessment*



# Digital Improvements

## Customer Planning and Journey

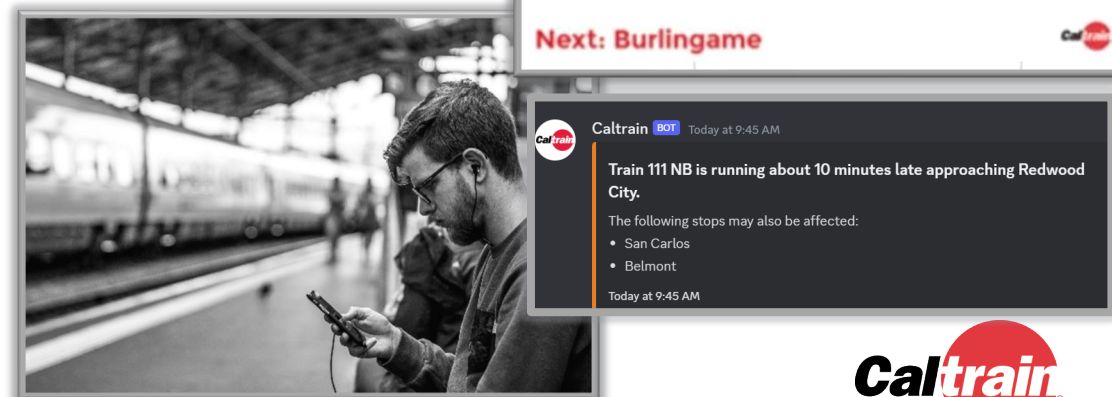
- New Caltrain Real-Time Service Alerts: Text & Email
- Improved Service Alert communication to website & trip planning apps
- EMU Experience: Power outlets, free Wi-Fi, digital passenger information system
- Regional MTC web & mobile friendly wayfinding experience

## Customer Service and Self-Help

- New Customer Service tool (CRM) to provide new services of live chat and email for customer support
- Self-help (AI) chat when viewing Caltrain website or mobile app to assist them quickly, accurately and get them riding
- 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 and provide Caltrain service alerts
- Ambassador multilingual outreach events



# Metrics for Success: Customer Experience & Retention

Data Source: Tableau Caltrain Executive Director Report

## Customer Experience Metrics

On Time Performance

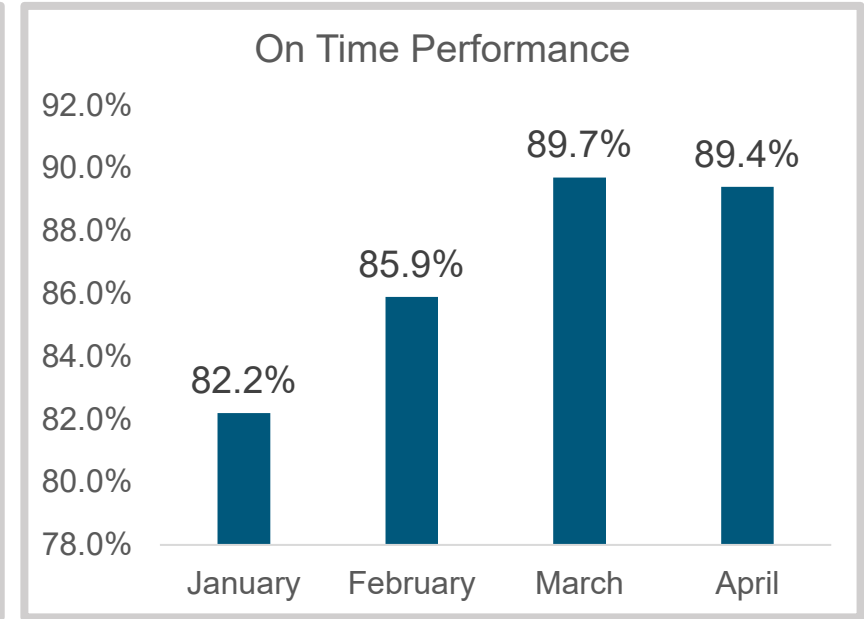
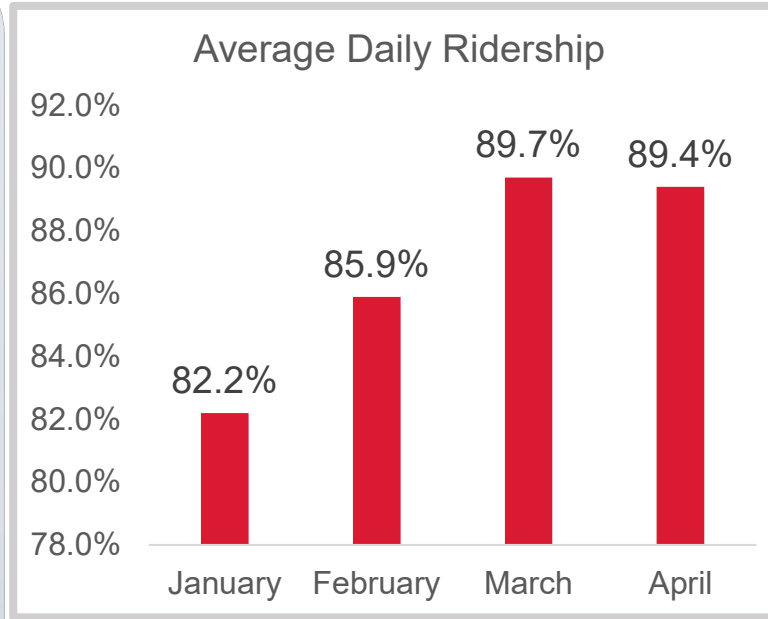
Daily Ridership

Complaints per 100k boardings

Satisfaction Score

Resolution Time

Ticket Sales



Future Metrics: Need CRM capability to track & analyze

### Customer Satisfaction

97.5%

2.2% ▲

### Complaints

Complaints per 100k boardings

9%

1.9% ▲

### Resolution Time

34 minutes

1.4% ▼

# Timeline: Customer Impacting Projects

- Service Alert Vendor Selection & configuration
- Customer Service: ROCS tool installation to aid CS with arrival times
- Electric Train Outreach Events (San Jose / San Francisco)
- Configuration of new social platform + moderator training

**Jul-Dec 2023**

**Jan- Jun 2024**

- Pilot Multi-Level Digital Display Signs at San Carlos station
- Launch Discord Social platform
- Service Alert Tool Training
- VMS Replacement Project (Spring-Fall)
- Customer Service: ROCS tool Training
- Continuing: Regional Wayfinding

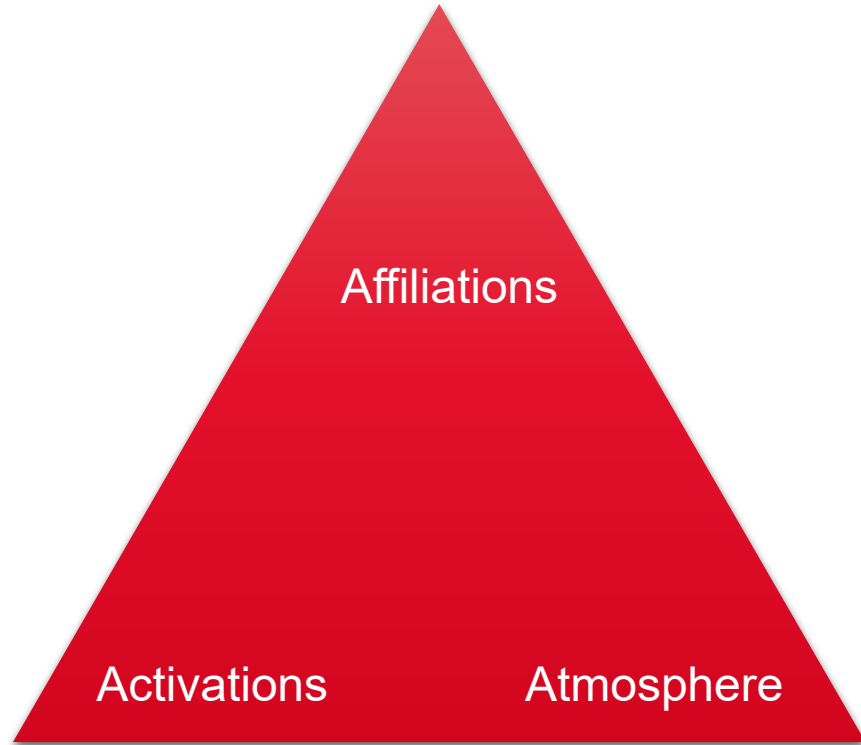
- Launch Text & Email Service Alerts for Customers
- Annual Customer Satisfaction Survey
- Stations Team: Station Improvements & Repairs
- EMU Launch: Digital Passenger Info System
- Improvements to Caltrain website
- RFP Process for Customer Management Solution
- Continuing: Regional Wayfinding + Prototype Testing

**July-Dec 2024**

**Jan-Jun 2025**

- Launch live chat & email as customer service channels
- Launch self-help chat for customers (via AI): Assists customers viewing Caltrain website or mobile app
- Launch Customer Satisfaction Survey for customers who contact the CS Team for support
- Continuing: Regional Wayfinding

# Reminder: 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

## 2023:

- Customer appreciation events at 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 Events San Francisco and San Jose (July and September 2023)
- South County Service Promotion (Oct '23)
- Fare Discounts (Summer/Fall 2023)
- Caltrain Store Soft Launch (Dec '23 – Jul '24) <https://www.caltrainstore.com/>



## 2024 / 2025:

- Electrification
  - EMU Public Events (May 11, August, September)
  - Target Group Events (Business, SPUR etc.)
  - Roadshow (Cities, Business Groups)
  - Large Scale Marketing (late Summer)
- Discounts
  - Variety of products including \$1 Youth Fare
  - Clipper START (Jan-Mar 2024)
  - Pass Forward (Ongoing)
- Bike to Caltrain Campaign (May 2024; 2025)
- Sport Team Co-Marketing (Fall)
- Explore Caltrain (July)
- Caltrain Store Hard Launch (July)
- City Partnerships (Ongoing)
  - [caltrain.com/citypartnership](https://caltrain.com/citypartnership)



**Thank You**