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APTA Operating Practices Working Group

Rail Transit Customer Relations Programs

Abstract: This *Recommended Practice* describes suggested approaches to improving customer relations for Rail Transit Agency (RTA). This includes training employees who deal with customers on a regular basis, tracking customer satisfaction, employee relations in terms of customer service, and other related topics.

Keywords: customer relations, customer relations training for front-line employees, customer satisfaction, community outreach, employee relations, general communication.

Summary: Rail Transit Agency customer relations efforts should be focused on providing customers with satisfying and pleasant transit experiences. Customer relations programs and practices involve a broad range of activities designed to enhance customers' experiences by implementing a unified, customer-oriented, organizational effort. These efforts include front-line communications, customer service, employee relations, community outreach programs, and general customer communications.

Scope and purpose: This *Recommended Practice* provides Rail Transit Agency with the elements of a comprehensive customer relations programs. These elements are complementary to the routine safe, on-time and clean transit services that transit systems provide. The purpose of this document is to provide RTAs with guidelines and a systematic approach to develop, implement, evaluate, and reinforce their customer relations program.

This document represents a common viewpoint of those parties concerned with its provisions, namely, transit operating/planning agencies, manufacturers, consultants, engineers and general interest groups. The application of any standards, practices or guidelines contained herein is voluntary. In some cases, federal and/or state regulations govern portions of a transit system's operations. In those cases, the government regulations take precedence over this standard. NATSA (North American Transit Services Association) and its parent organization APTA recognizes that for certain applications, the standards or practices, as implemented by individual transit agencies, may be either more or less restrictive than those given in this document.

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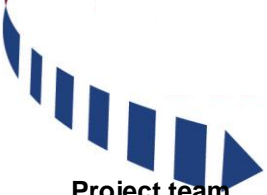
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Introduction

This introduction is not part of APTA RT-OP-RP-008-4 Rev 2 *Recommended Practice for Rail Transit Agency Customer Relations Programs*.

Rail Transit Agency (RTA) exist in an environment that is characterized by strong competitive forces for their customer base. Consequently, in order for a transit system to flourish, it is essential that it continually strives to build customer satisfaction and loyalty.

Therefore, it is critical that RTAs develop and implement comprehensive customer relations programs that permeate the organization and promote the delivery of quality customer service. An effective customer relations program will serve to retain current customers while attracting new customers. Thus, it is an inescapable fact of a transit system's business life that the quality of its customer service plays a salient role in dictating the course of its future.

Customer relations programs may be manifested by myriad features ranging from proactive measures (e.g., media-based marketing campaigns or installation of equipment improvements such as elevators or electronic digital display signage) or "invisible" measures such as the redesign of a station with an improved passenger circulation pattern.

Each RTA has its own customer relations atmosphere that is dictated by local conditions; however, it is also recognized that all RTAs have a common, universal challenge to possess an optimal customer service program. It is from this perspective that the following recommended practices are intended. The goal of this document is to provide guidance in meeting these challenges.

This recommended practice represents a common viewpoint of those parties concerned with its provisions, namely transit operating/planning agencies, Rail Transit Agency, manufacturers, consultants, engineers and general interest groups. The application of any standards or recommended practices contained herein is voluntary. In some cases, federal and/or state regulations govern portions of a rail transit system's operations.

In those cases, the government regulations take precedence over this recommended practice. APTA recognizes that for certain applications, the recommended practices, as implemented by individual Rail Transit Agency, may be either more or less restrictive than those given in this document.

APTA recommends the use of this recommended practice by:

1. Individuals or organizations that operate Rail Transit Agency;
2. Individuals or organizations that contract with others for the operation of Rail Transit Agency; and
3. Individuals or organizations that influence how Rail Transit Agency are operated (including but not limited to consultants, designers and contractors).

Rail Transit Agency Customer Relations Programs

1. Rail Transit Agency Customer Relations Program Activities

RTA should develop a customer relations program and identify the elements of the program and the responsibilities of all RTA employees responsible for carrying out program activities.

2. Customer relations training for employees

The RTA should provide customer relations training for all employees who interface with customers. The RTA should monitor and reinforce their performance. The level of training employees receive should be commensurate with the level or type of interface they have with customers.

This training should focus on meeting or exceeding customers' expectations. At a minimum, training elements could include the following topics:

- The importance and value of providing quality customer service: This includes building ridership; job satisfaction; and reductions in problems, complaints and stress.
- Fundamental interpersonal communication skills.
- Identifying and solving customer problems.
- Defusing angry customers.
- Responding to fare evasion in accordance with RTA policies.
- Providing service to customers with disabilities: This includes giving special assistance to mobility-limited customers, communicating in manners designed to meet special needs (e.g., using writing instead of speech or utilizing extended patience and listening skills) and determining and meeting these customers' special needs.
- Public address announcements: This includes the appropriate conditions, content, and techniques of when, how, what, and why. It also includes standard announcements such as no smoking, service delays, service disruptions, etc. and emergency announcements such as station or train evacuations.
- Professional image: The purpose and value of projecting a professional image, including being in neat, well-tailored authorized uniform attire, and being properly groomed.
- Travel information: The provision of accurate information concerning schedules, routes, maps, transfer points, points of interest, facilities and equipment, paths of accessibility for passengers with disabilities, lost and found, contact information, and other information necessary to aid customers using transit.
- Interacting with those whose first language is not English or those who are not familiar with the currency system.
- Lost child: Lost children should be protected at all times and employees should stay with a lost child in a highly visible location until security arrives to relieve the employee of that responsibility.
- Dealing with customers during abnormal situations
- RTA: Specific customer and public service programs.

3. Customer satisfaction

The level of customer satisfaction is a major determinant in building ridership as well as customer loyalty and advocacy. It is very important that an RTA understands the level of customer satisfaction within its customer base and ensures that all staff members are aware of his/her impact in providing quality customer service.

3.1 Customer satisfaction survey

RTA Surveys should be conducted in order to determine, understand, and evaluate the characteristics of its customer satisfaction. A customer satisfaction survey measures customers' perceptions on a broad range of service features (e.g., on-time performance, availability of schedules, employee courtesy, etc.).

Customers' responses to survey questions are then measured (e.g., on a point scale) to determine satisfaction levels. Survey results are then evaluated, and the RTA should consider courses of action based on this evaluation and should communicate survey results to all employees.

Ensuing surveys should be conducted over a period of time (e.g., every other year) to determine trends and further courses of action to raise customer satisfaction and loyalty and to achieve efficiencies.

Management should continuously evaluate key customer touch-points that are major contributors to the overall customer experience and should use inputs from cross-functional teams or representatives to revise or create processes and procedures that will enhance the customer's riding experience.

3.2 Customer feedback process

In order to improve customer satisfaction, RTA to establish a process to receive and respond to customer complaints, commendations, and recommendations.

3.2.1 Customer feedback intake and processing

RTA to establish a process for responding to customer complaints, commendations, and recommendations in a timely manner. This should involve having dedicated staff assigned for this purpose (e.g., a Customer Service Department or a call center) or designated staff members from certain departments (e.g., Operations, Marketing, or Public Affairs).

In order to receive and process customer feedback quickly and effectively, the RTA should establish and publicize all available communication paths that channel all customer feedback into a centralized location. Communication paths should include but are not limited to mail and walk-in service at a published address, a telephone hotline, social media outlets, and a website.

RTA to established process for responding to customer feedback in a timely manner. This should involve having dedicated staff for this purpose (e.g., a Customer Service Department or a call center) or designating staff members of certain departments (e.g., Operations, Marketing, or Public Affairs) to fulfill this purpose.

RTA to have a dedicated staff available to readily answer and resolve travel information queries and problems from the public.

RTA to identify a procedure related to the coordination of customer relations feedback that may have Federal Transit Administration regulatory Title VI compliance implications.

3.2.2 Customer feedback database

RTA to develop a database to track customer feedback to determine trends, patterns or recurring issues (e.g., routes with schedule problems or employees with repeated customer feedback, etc.). RTA to establish acceptable timelines for response. RTA to use trend data to make changes to its operation, where appropriate.

3.2.3 Field observations

Develop to procedures for supervisory/managerial staff for periodic field observations of operations and employee interactions with customers.

4. Employee relations

4.1 Employee surveys

In order to deliver exceptional customer service on a continuous basis, RTA executive leadership must provide visible, tangible, and continuing organization-wide support for customer service, both internal and external. To this objective, survey its employees to identify any barriers that employees feel are hindrances to them providing high-quality customer service. Communicate the results of the surveys to all employees and explain how the information is being used by the RTA to maintain and improve customer relations.

4.2 Employee use of the system

RTA employees provide a unique perspective on rail transit customer service. In order to gain knowledge of the customer experience, encourage employees to ride trains and use the RTA services. In order to improve customer service, the employee should report abnormal system conditions to the appropriate RTA personnel.

4.3 Employee recognition programs

Develop programs to recognize employees whose job performance or ideas have resulted in innovative customer service advancements and/or enhanced satisfaction.

5. Community outreach

Employ specific methods of community outreach as means of improving customer satisfaction and relations. These efforts should also be utilized to identify problems, improve the RTA's public image and grow ridership. The following sections contain examples of community outreach.

5.1 Advisory committee on disabilities

Initiate and interact with, on an ongoing basis, a community group representing customers with disabilities. This advisory group advises the RTA on a broad range of ADA and access related issues, including but not limited to the following:

- rail vehicle/station equipment and station designs (relative to ease of use and accessibility)
- employee training
- communication issues (e.g., elevator status)
- special fare structures

5.2 Intergovernmental relations

Develop and implement initiatives to interact with various governmental agencies that influence factors relative to customer relations (e.g., police surveillance where security issues exist).

Develop and implement initiatives to interact with elected governmental representatives whose constituencies are current or potential customers.

5.3 General community groups

Develop and implement initiatives to interact with various other community groups within and near its service area, such as neighborhood organizations, school groups (e.g., Parent-Teacher Associations or student tours) or local chambers of commerce.

5.4 Special on-the-property community outreach functions

Consider developing and implementing specific programs designed to promote community relations, image, and ridership that are based on their own properties.

5.5 Open houses available to the public

The RTA should consider holding open houses which may include special tours for designated populations such as students at a specific school or general open houses at RTA facilities. Care must be taken to ensure the open houses do not compromise the safety of employees or the service.

5.6 Special Event Partnerships

Explore partnering opportunities with large public event organizers (i.e. festivals, major league sporting events, concerts) to promote use of transit and encourage participation in the event. The RTA should also consider special event theme trains for occasions such as Halloween or the “Santa Express.” These trains be operated in conjunction with other organizations (e.g., municipal cultural affairs departments) for specific purposes or in general revenue service.

6. General customer relations communications

Develop a means of notifying front-line employees, adjacent transit properties, and the riding public of various types of information such as, special event service, scheduled service changes, service disruptions, etc. This should be done via signage posted in stations and on rail cars, in the news media, websites, social media, subscription services, etc.

Definitions

customer relations: The efforts of an RTA or its employees to constantly and consistently exceed the customer’s expectations.

rail transit agency: Any entity that provides services on a rail fixed guideway public transportation system. *(49 CFR Part 673.5 Definitions)*

Abbreviations and acronyms

ADA	Americans with Disabilities Act
APTA	American Public Transportation Association
NATSA	North American Transit Services Association
RTA	Rail Transit Agency

Summary of document changes

1. Document formatted to the new APTA standard format.
2. Sections have been moved and renumbered.
3. The title of the document was changed to *Customer Relations Programs*.
4. Some global changes to section headings and numberings resulted when sections dealing with references and acronyms were moved to the end of the document, along with other cosmetic changes, such as capitalization, punctuation, spelling, grammar and general flow of text.
5. Section 1: New title added *RTA Customer Relations Program Activities*.
6. Section 1: Modified requirements so that a formal customer relations program is developed. Original training language retained in following section.
7. Section 2: Deleted *front line* from section title.
8. Section 2: Added bullet addressing fare evasion response.
9. Section 2: Clarified that the level of training in this recommended practice should be commensurate with the extent of contact employees have with customers.
10. Section 2: Deleted *job security* from first bullet.
11. Section 2: Added last bullet *Specific customer relations and public service programs*.
12. Section 3: Minor sentence clarifications.
13. Section 3.2: Title changed from *Customer comment process* to *Customer feedback process*.
14. Section 3.2.1.: Added “commendations and recommendations” to list of information RTA should respond to.
15. Section 3.2.2: Title changed from *Customer comment database* to *Customer feedback database*.
16. Section 3.2.2: Changed “problem” to “issue”
17. Section 3.2.3: Title changed from *Customer ride alongs* to *Field Observations* and changed subject matter to reflect new title.
18. Section 3.2.1: Added Title VI requirements
19. Section 4: Minor sentence clarifications to put requirements on RTA, not individual employees.
20. Section 4.1: Added requirement for RTA to share survey responses and actions with employees.
21. Section 5.1: Bullets added to the section.
22. Eliminated Section 7 *Adopt a Station*.
23. Modified definition of *customer relations*.

Document history

Document Version	Working Group Vote	Public Comment/ Technical Oversight	Rail CEO Approval	Rail Standards Policy & Planning Committee Approval	Publish Date
First published	June 18, 2003	-	-	June 6, 2004	June 2004
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