RECOMMENDED PRACTICE

American Public Transportation Association
1666 K Street NW
Washington, DC 20006

Developing and Maintaining a Customer Service Culture

Abstract: This *Recommended Practice* will assist transit agencies in developing and maintaining a customer service culture within the transit agency that is attainable and focused on all transit employees and the communities they serve.

Keywords: customer service, curriculum, training

Summary: This *Recommended Practice* suggests guidelines for developing, promoting and evaluating customer service training for employees. Descriptive summaries of customer service programs, including the syllabus/agenda, implementation plan and evaluation strategy are included.

Scope and purpose: This document provides guidance to operating agencies in the deployment of customer service training, including curriculum development, a promotional and implementation plan and an evaluation strategy.

Summary of Recommendations:

- Promote a customer service program
- Ensure that a defined, consistent customer service message exists for the entire agency.
- Identify specific customer service issues your training department can address.
- Internal customers (employees) are as important as external customers.
- Share best practices among employees in an ongoing fashion.
- Evaluate the customer service program at different levels within your agency

- Recognize employees for exemplary customer service skills
- Define a curriculum for a customer service training program with specific steps
- Select the most appropriate training method for your agency
- Evaluate the program after training to ensure that employees understand the message and skills that were taught
- Conduct rated observation rides
-

Contents

1. Customer service training integration

1.1 Promoting a customer service program

Ensure that a defined, consistent customer service message exists for the entire agency. This message, contained in the agency's mission statement is promoted and disseminated from the top down.

Upper management should provide full support (tools, resources and budget) to implement and sustain the customer service program. It also issues the directive to develop a comprehensive customer service plan.

1.1.1 Curriculum development

Training specialists should identify what customer service issues the training department can address. They should identify the employee skills required at different levels of the organization. This information would determine various levels of training (i.e. refresher and remedial training).

1.1.2 Sustaining the message (motivation)

Management's role is to keep the customer service message in focus and to reinforce the idea that customer service includes all the agency's customers. Internal customers (employees) are as important as external customers. This message is sustained through the following:

- ongoing communication and updates
- incentive programs that \reward excellence
- theme-based approach

1.1.3 Knowledge-based sharing

The agency should consider how it can informally share best practices among employees in an ongoing fashion. This can increase buy-in from stakeholders.

1.1.4 Program evaluation

The customer service program should be evaluated at different levels: post training, against agency customer service data, and so on. Upper management needs to continuously evaluate the program against the current environment. Consider whether the program still meets the agency's needs or whether it needs to be changed updated or enhanced.

1.2 Distributing the message

The customer service program's message must originate with upper management. The general manager or equivalent should set the core principles for the agency regarding what the program should entail. Other members of the senior staff should participate to show buy-in and increase awareness of the importance of the program.

One important part of getting the word out is recognizing frontline employees for their efforts. This can be based on the recommendation of a supervisor, a good customer service record, commendations, positive customer comments, good attendance or low accident rates. Employees and customer also can be invited to nominate employees for recognition.

Recognition can include company paraphernalia such as patches or pins; recognition in public or team meetings; a mention in the agency newsletter; or financial incentives such as gift cards.

1.3 Defining the curriculum

A curriculum for a customer service training program should incorporate the following general principles:

- **Make it your own.** Ensure a positive customer experience for the customer by treating them with respect and courtesy and by being flexible within the established rules and Standard Operating Procedures.
- **Everything matters.** Employees should be encouraged to pay attention to the smallest details. In order to deliver quality, the agency has to deliver it at all levels. Any compromises can relax "quality awareness" throughout the organization.
- **Surprise and delight.** Delight customers and go beyond their expectations. Employees should look for ways to give something to the customer that they never anticipated.
- **Embrace resistance.** The agency should accept all feedback, both positive and negative, and use the negative feedback to find ways for the agency to improve. The agency should consider all feedback important. Rather than ignore it, management should respond constructively and calmly, explaining its position on the issue. Accepting and responding to feedback should be built into the core principles of the company.
- **Leave your mark.** The agency should be involved and contribute to the community in which it resides. (i.e. community service projects)

1.3.1 "The Starbucks Experience"

These principles, adapted from the Starbucks Corporation as described in "The Starbucks Experience" are applicable to any successful organization.

Step 1: Conduct needs assessment.

This step is necessary because the work population shifts and changes over time. Methodology:

- pre-survey for all transit employees
- management buy-in and commitment

Step 2: Establish training goals.

The purpose of this step is:

- to demonstrate the interconnectivity of each transit employee and how each person impacts the organization and the community;
- to understand that customer service principles are ongoing life application skills; and
- to positively contribute to the agency's desired customer service culture.

Step 3: Define the target audience.

This includes all of the following:

- executive
- middle management
- administrative
- operational
    - supervisors
    - dispatchers
    - operators

- call center staff
- sales staff
- maintenance
    - supervisors
    - mechanics/technicians
    - custodial or service personnel

Step 4: Develop and design the curriculum.

Subject areas should include, but are not limited to:

- communication
- conflict resolution
- effective listening skills
- giving and receiving feedback
- respect
- cooperation
- empathy
- accountability

Recommended training methods:

- lead by example (facilitator, guest speakers)
- role plays, exercises, games
- scenarios
- group discussion/participation
- practice

1.4 Distributing the training message

Each agency should choose the most appropriate methods from among the following:

- instructor-led
- video messages
- e-learning/CBT/Web-based
- e-mail blog
- virtual environments
- posters
- announcements
- newsletters
- radio messages
- hyper alerts
- prerecorded announcements
- floor safety meeting
- health and safety fairs
- wellness programs
- mentor programs/peer reviews
- cross-training
- integrating the customer service message into other existing programs

Trainers should rate the performance of participants through hands-on practice, such as role playing. The agency should continue to market the program after training is over to keep employees focused on customer service.

2. Evaluating the training

Evaluate the program after training to ensure that employees understand the message and skills that were taught. Supervisors should observe and rate employee performance for an extended time after training.

Management also can look at data related to ridership (complaints and recommendations) and evaluate the cost of the training program versus the gains achieved. The results can be compared with those of other transit properties. Another evaluation method is to use a "mystery rider," who interacts with frontline employees and then reports on the service provided.

2.1 Learner evaluation form
- Learning objectives (II)
- Instructor (I)
    - Did the instructor treat me like an adult?
    - What was the instructor's level of expertise?
    - Was the instructor inspiring and motivating?
    - Did the instructor encourage participation?
    - Did the instructor foster interaction?
    - Did the instructor make the subject matter relevant and realistic?
    - Was the instructor's presentation well-structured, organized and focused?
- Training materials rating (I)
    - videos/scenarios
    - student reference manuals
    - procedures/standard operating procedures
    - pocket cards/"lest we forget"
    - posters
    - PowerPoint slides
- Exercise rating (I)
    - Were the exercises relevant to the training objective?
    - Were the exercises realistic?
    - Were the instructions and directions clear?
- Logistics (I)
    - schedule of training/length of training
    - classroom climate
    - acoustics
    - equipment
    - seating
    - location (noise, transportation, parking)
    - recommendations/suggestions (I)
    - overall impressions (I)

2.2 Instructor's view
- Conduct rated observation rides
    - rated instructor-led practice (II & III)
    - rated line-instructor practice (II & III)
    - mystery riders (customers) (III)

- ADA monitors (III)
- use employees (first management type) (III)
- managers (morning and afternoon rushes) (III)
- audits (III)
- Written confirmations (signature sheet)
    - based on the learning objectives (II)
- Written exams (II)
- Data
    - customer complaints (IV)
    - commendations (IV)
    - written exam results (II)
    - number of incidents (IV)
    - number of operator help/assistance calls to dispatch/supervisors (IV)
    - ridership (IV)
    - customer satisfaction surveys (IV)

3. Customer service expectations of bus operators

~~Bus~~ Customers expect drivers to be:

- respectful
- polite
- positive
- knowledgeable (~~of~~ system, routes, fares, payment options, attractions, travel directions)
- able to provide service to customers with disabilities
- able to handle angry customers
- able to handle conflict avoidance/resolution
- able to make manual announcements
- able to assist customers in emergency situations
- able to keep the bus clean

The expectations are similar for all other transit employees. They are expected to be:

- respectful
- polite
- positive
- knowledgeable of transit operations
- able to handle conflict avoidance and resolution