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APTA Rail Transit Operating Practices Working
Group

Recommended Practice for Customer Relations

Abstract: This *Recommended Practice* describes suggested approaches to improving customer relations for Rail Transit Systems (RTS). 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 Systems 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, general customer communications, and adopt-a-station programs.

Scope and purpose: This *Recommended Practice* provides Rail Transit Systems 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 RTSs with guidelines and a systematic approach to develop, implement, evaluate, and reinforce their customer relations program.

This *Recommended Practice* 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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Introduction

This introduction is not a part of APTA RT-OP-RP-008-04 First Revision December 31, 2014 *Recommended Practice for Rail Transit System (RTS) Customer Relations*.

RTSs 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 RTSs 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 RTS has its own customer relations atmosphere that is dictated by local conditions; however, it is also recognized that all RTSs 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 systems, 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 systems, 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 systems;
2. Individuals or organizations that contract with others for the operation of rail transit systems; and
3. Individuals or organizations that influence how rail transit systems are operated (including but not limited to consultants, designers and contractors).

Note on alternate practices

Individual rail transit systems (RTSs) may modify the practices in this recommended practice to accommodate their specific equipment and/or mode of operation. APTA recognizes that some RTSs may have unique operating environments that make strict compliance with every provision of this recommended practice impractical. As a result, certain RTSs may need to implement the recommended practices herein in ways that are more or less restrictive than what this document prescribes. An RTS may develop alternates to the APTA recommended practices as long as the alternates are based on a safe operating history and are described and documented in the RTS's System Safety Program Plan (SSPP) or another document that is referenced in the SSPP.

Documentation of alternate practices shall:

- Identify the specific APTA rail transit safety recommended practice requirements that cannot be met;
- State why each of these requirements cannot be met;
- Describe the alternate methods used; and
- Describe and substantiate how the alternate methods do not compromise safety and provide a level of safety equivalent to the practices in the APTA safety standard (operating histories or hazard analysis findings may be used to substantiate this claim).

It must be noted that rail transit is not directly comparable to railroads (e.g. Amtrak, commuter, freight rail, etc.). Rail transit systems differ greatly in the types of service, vehicles and technology employed, with some systems operating fully automated trains on exclusive rights-of-way and others operating on streets mixed with traffic. Rail transit demands a unique approach to solving its problems, and the APTA Rail Transit Standards Program was enacted to accomplish this complex task.

Customer Relations

1. Front-line communication with customers

The RTS should train all front-line employees who come in contact with customers to properly communicate with customers. The RTS should monitor and reinforce their performance. The level of training employees receive should be commensurate with the extent of contact they have with customers.

2. Customer relations training for front-line employees

The RTS should provide customer relations training for all of its front-line employees. This training should focus on meeting or exceeding customers' expectations. As a minimum, this training should include the following topics:

- The importance and value of providing quality customer service: This includes building ridership; job security; job satisfaction; and reductions in problems, complaints and stress.
- Fundamental interpersonal communication skills.
- Identifying and solving customer problems.
- Defusing angry customers.
- Addressing and resolving fare disputes. Operators should only be required to challenge a passenger for proper fare once and should never escalate the situation. If necessary, the operator should contact the control center for assistance and instruction.
- 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

3. Customer satisfaction

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

3.1 Customer satisfaction survey

The RTS should conduct surveys 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 RTS should consider courses of action based on this evaluation and should communicate survey results to front-line 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 comment process

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

3.2.1 Customer comment intake and processing

The RTS should establish a process for responding to customer concerns and comments 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 or Public Affairs).

In order to receive and process customer comments quickly and effectively, the RTS 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.

The RTS should also have an established process for responding to customer concerns and comments 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 or Public Affairs) to fulfill this purpose.

A RTS should also have a dedicated staff available to readily answer and resolve travel information queries and problems from the public.

The RTS should also have a dedicated staff available to readily answer and resolve travel information queries and problems from the public.

3.2.2 Customer comment database

The RTS should have a database to track customer comments to determine trends, patterns or recurring problems (e.g., routes with schedule problems or employees identified with multiple complaints, etc.). The RTS should establish time lines to address each complaint and to get back with the customer. The RTS may use trend data to make changes to its operation, where appropriate.

3.2.3 Customer ride-alongs

The RTS should have procedures for supervisory/managerial staff to meet and/or ride with customers to resolve concerns or to explain RTS procedures or conditions.

4. Employee relations

4.1 Employee surveys

In order to deliver exceptional customer service on a continuous basis, RTS executive leadership must provide visible, tangible, and continuing organization-wide support for customer service, both internal and external. To this objective, the RTS should survey its employees to identify any barriers that employees feel are hindrances to them providing high-quality customer service.

4.2 Employee use of the system

RTS employees provide a unique perspective on rail transit customer service. In order to gain knowledge of the customer experience, the RTS should encourage employees to use the system. The employee should report conditions that may be detrimental to or improve customer service, as defined by the RTS.

4.3 Employee recognition programs

The RTS should have programs to recognize employees whose job performance or ideas have resulted in increased customer service or enhanced satisfaction.

5. Community outreach

The RTS should 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 RTS's public image and grow ridership. The following sections contain examples of community outreach.

5.1 Advisory committee on disabilities

The RTS should initiate and interact with, on an ongoing basis, a community group representing customers with disabilities. This advisory group advises the RTS on a broad range of ADA-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

The RTS should undertake initiatives to interact with various governmental agencies that influence factors relative to customer relations (e.g., police surveillance where security issues exist).

The RTS should undertake initiatives to interact with elected governmental representatives whose constituencies are current or potential customers.

5.3 General community groups

The RTS should undertake 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

The RTS should consider 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 RTS should consider holding open houses. Open houses may include special tours for designated populations such as students at a specific school or general open houses at RTS 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

The RTS should 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 RTS 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

The RTS should have methods 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.

7. Adopt-a-station programs

The RTS should consider implementing an “adopt-a-station” program that involves community institutions (e.g., community organizations, schools, art museums, etc.) committing to creating and maintaining special features to a station, such as landscaping, murals, or painted benches.

Definitions

customer relations: Practices and methods employed by a RTS to interact with external customers. Primarily these refer to communicating with customers on matters such: signage; brochures; service interruptions;

public address announcements; media relations; scheduling for special events; upkeep of stations; and the consideration customers receive in the RTS’s planning and operations.

front-line employees: An employee who directly interacts with the public.

RTS: The organization that operates rail transit service and its supporting activities.

Abbreviations and acronyms

ADA	Americans with Disabilities Act
APTA	American Public Transportation Association
NATSA	North American Transit Services Association
RTS	Rail Transit System

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 “Rail Transit System Customer Relations”
4. Scope and summary moved to the front page.
5. Sections of definitions, abbreviations and acronyms moved to the rear of the document.
6. Three new sections added: “Summary of document changes,” “Note on Alternate Practices” and “Document history.”
7. 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.
8. Section 1: Some sentence structure modifications.
9. Section 1: 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: bullet, added service delays and disruptions to the list of public address announcements. Also added bullet about dealing with customers during abnormal situations.
11. Section 3: Minor sentence clarifications.
12. Section 4: Minor sentence clarifications to put requirements on RTS, not individual employees.
13. Section 5: Minor sentence clarifications.
14. Section 5.1: Bullets added to the section.
15. Section 5.6: Deleted section titled *Special Occasion Theme Trains* (8.5 in previous version)
16. Section 5.6: Added a new section titled *Special Event Partnerships*
17. Section 6: Removed requirement that RTS should have a dedicated staff to fulfill customer communications function.

Document history

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