



**Massachusetts Bay  
Transportation Authority**

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# **In-Station Customer Experience**

**Fiscal and Management Control Board**

**March 20, 2017**



## Current State of CSA Workforce

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- Currently, 187 CSAs performing in-station customer service and helping riders with fare collection, safety, accessibility and operations
- Of the CSAs, 99 are waiting to be placed as motorpersons, and 88 are full-time CSA, mostly former token collectors
- Total annual cash-cost of the CSA program is \$20M
- L589 12/19 agreement contemplated MBTA partnering with industry for in-station customer service





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## Carmen's Union L589 Agreement

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MBTA's agreement with the Carmen's Union L589 specifically contemplates a change in the CSA program

Agreement allows MBTA to fundamentally change delivery of in-station customer service and improve customer experience by partnering with ambassadors

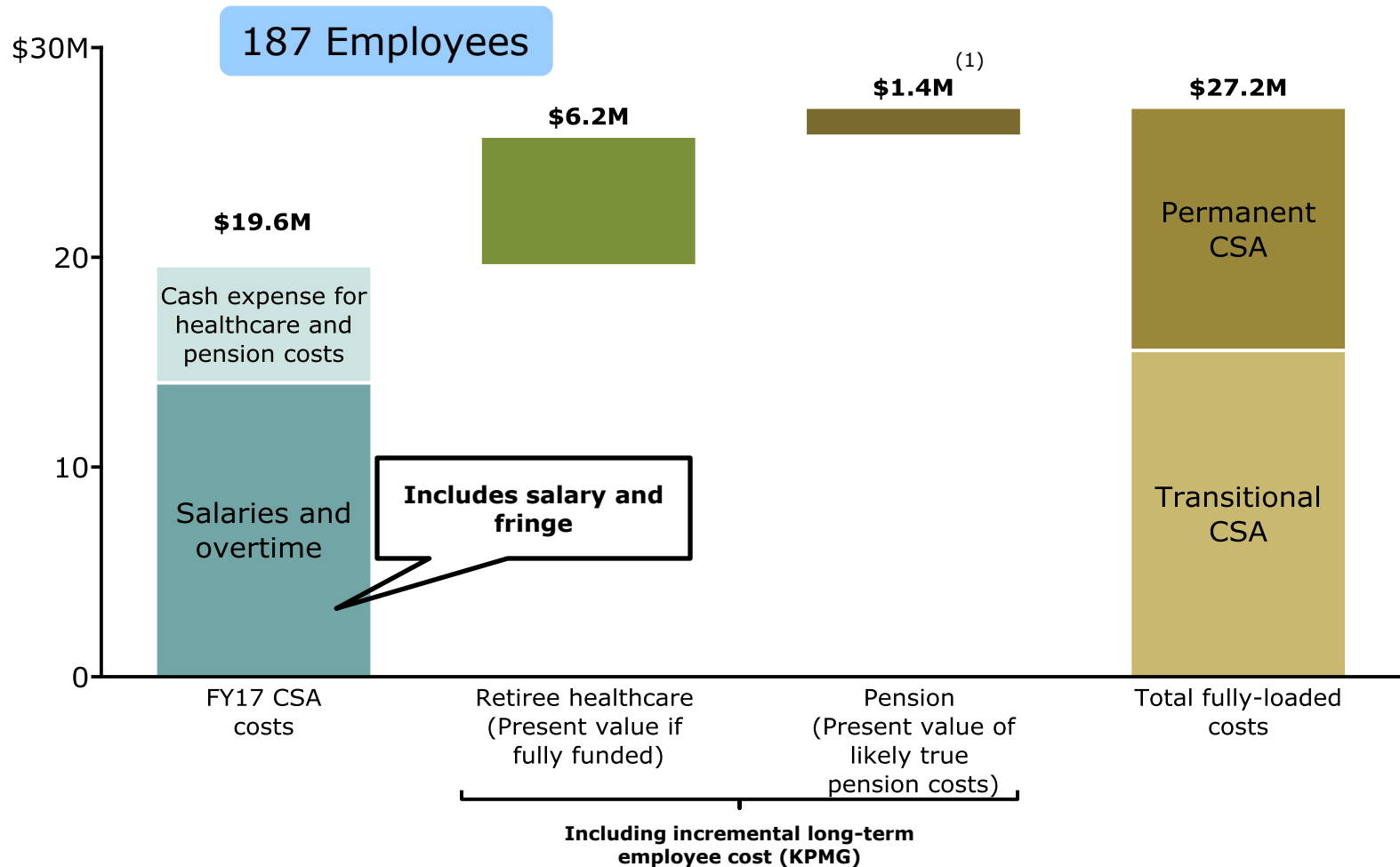
- 88 "permanent CSAs" maintain current roles until they retire or voluntarily leave the organization
- 99 "transitional" CSAs who are trained motor-persons will move into full-time operator roles (over a 12 month period)

New ambassador program will be totally focused on customer experience. Historically, CSA positioned staffed by personnel repurposed from other roles:

- › Token collectors and train attendants became CSAs when their original positions were eliminated in early 2000s
- › Currently, motor-persons waiting to become full-time operators make up the majority of CSAs (transitional role)



## Fully Loaded Costs of CSA program is \$27M Annually



(1) Actuarially derived pension fund liability calculations use a 7.75% discount rate. However, average historical pension fund returns have underachieved, increasing MBTA's pension contribution and unfunded liability over time. Given current low return environment and pension profile, a 5.0% discount rate more fully reflects MBTA's expected costs. \$0.5M represents incremental funds required to fund a 5.00% discount rate environment.



## “Ambassador Services” is an established industry across the US

- Hospitality Ambassadors are individuals selected and trained for providing **customer experience**
- Ambassadors are commonly employed in cities' downtown areas, to:
  - **Engage with visitors**
  - **Assist customers and businesses**
  - **Provide directions**
  - **Answer questions**



Ambassador companies can provide direct and indirect assistance in any and all of the following fields:

Hospitality

Safety

Cleaning

- Can include landscaping

Outreach

\* All ambassadors, will be subject to the same level of drug testing and background checks



## Ambassadors Provide Direct and Indirect Assistance

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### Hospitality

- Improve customer experience, via: directions, information, answering questions etc.

### Safety

- Create safer space, via: patrols, interacting with people and businesses, providing police with information, etc.

### Cleaning

- Create clean environment via: litter collection, power washing, graffiti removal, snow removal etc.
- Can include landscaping.

### Outreach

- Companies employ social workers with the purpose to engage with the homeless population.



## Ambassadors work in transit agencies and in Boston



- Philadelphia – PATCO employs full-time and part-time ambassadors to **provide a presence and increase customer's sense of security**



- San Francisco – SFMTA ambassadors assist in **major events and disruptions in service**



**In Boston** they can be seen in the Downtown area, as part of the downtown business improvement district (BID)

The following cities have implemented ambassadors:

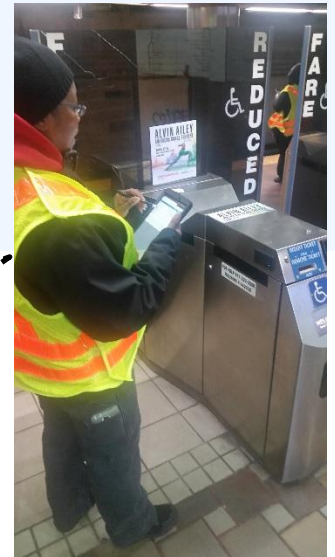




## Better use of Technology can Provide Higher Accountability and Better Service

Value	Technological Solutions
Management & Accountability	<ul style="list-style-type: none"><li>✓ Real-time GPS <b>check-in at station</b> via tablet</li><li>✓ <b>Station checklist inspection</b>, directly on tablet</li><li>✓ <b>Measurable performance</b> – track customer interactions</li><li>✓ <b>Dynamic scheduling</b> – move by demand</li></ul>
Overall Service	<ul style="list-style-type: none"><li>✓ Ambassadors will have access to <b>real-time information</b>, schedules, disruption notices etc.</li><li>✓ Real-time <b>reporting and tracking of:</b><ul style="list-style-type: none"><li>✓ <b>Safety hazards</b></li><li>✓ <b>Facility requests</b></li><li>✓ <b>Maintenance requests</b></li></ul></li></ul>

\* The T has recently implemented ServiceNow on tablets for AFC technicians







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## Partnering with industry could increase coverage and improve customer experience

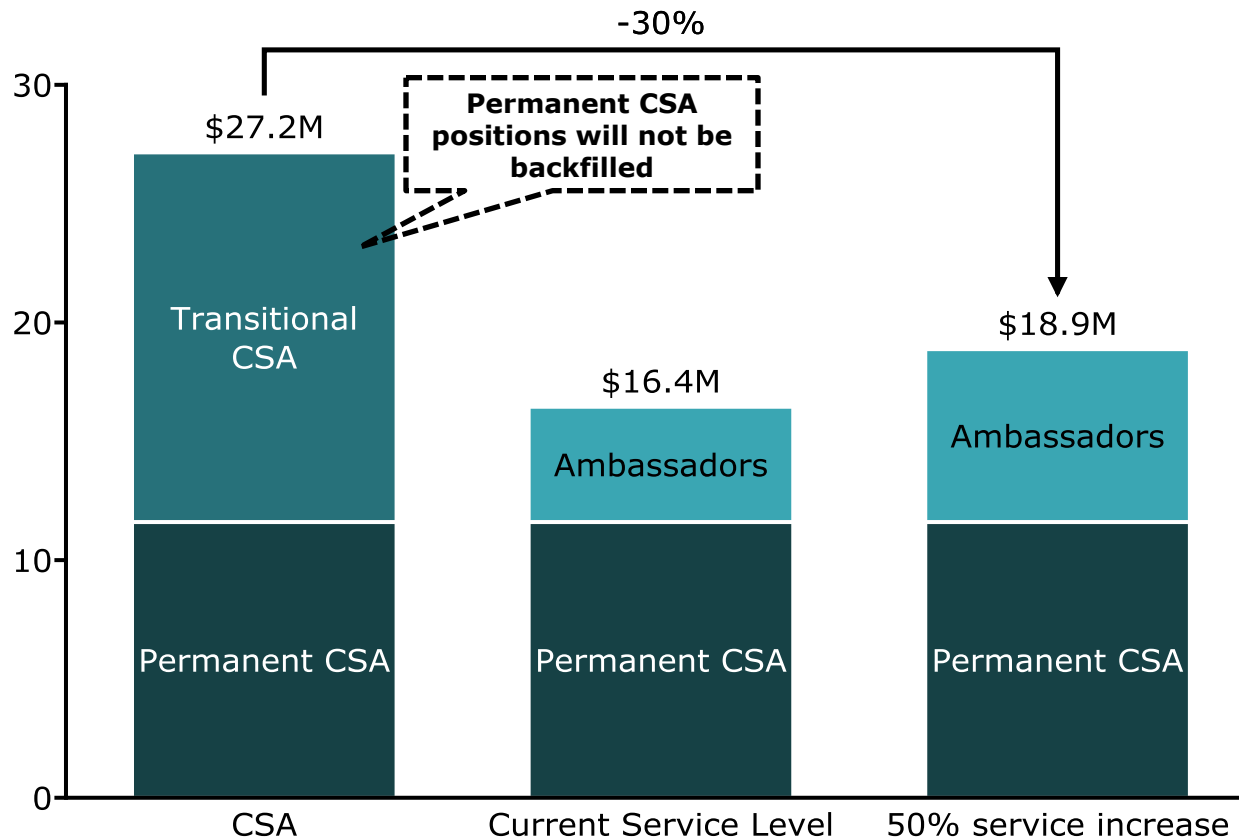
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Value	
Customer Service	<ul style="list-style-type: none"><li>✓ Trained to be proactive</li><li>✓ Dynamic scheduling</li><li>✓ Bi-lingual ambassadors at select stations</li></ul>
Safety	<ul style="list-style-type: none"><li>✓ Better training</li><li>✓ Real-time reporting of hazards</li><li>✓ Higher accountability – Safety Sensitive</li></ul>
Cleaner Stations	<ul style="list-style-type: none"><li>✓ Real-time reporting of cleaning needs</li><li>✓ Accountability for station status</li></ul>
Maintenance	<ul style="list-style-type: none"><li>✓ Real-time reporting of broken machines and facilities</li><li>✓ Accountability for station status</li></ul>
Management	<ul style="list-style-type: none"><li>✓ Daily real-time check-in via tablet</li><li>✓ Daily station inspection on tablet</li><li>✓ Real-time data and measurable performance</li><li>✓ Increase management &amp; accountability</li></ul>



## MBTA could increase in-station staffing by 50% for 70% of current cost

### Annual Cost for T Service Level



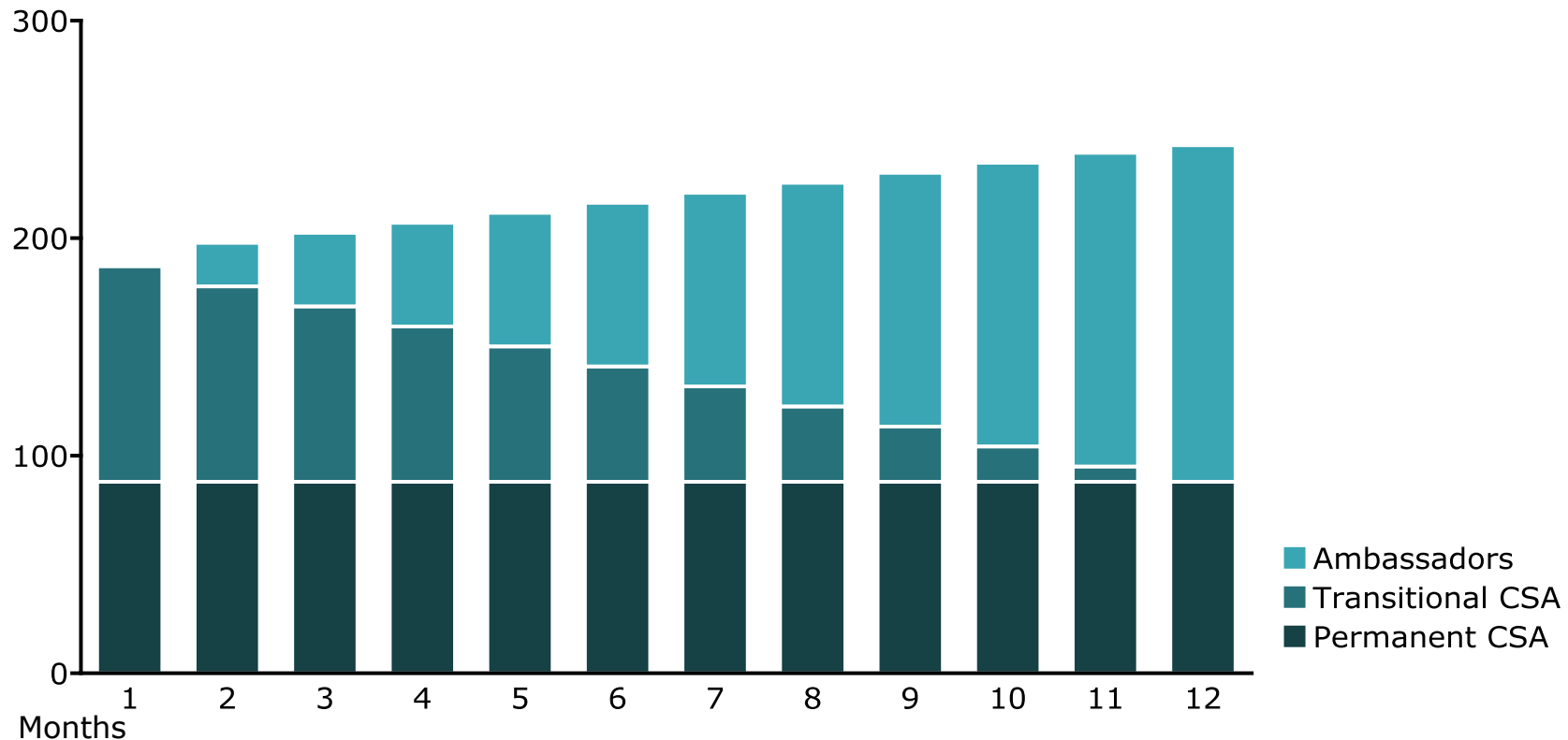
\* Ambassador price average calculated from 9 public record proposals for ambassador services in transportation agencies and downtown cities



## Staffing levels to be managed following attrition

### In-Station Staffing:

- **Transitional CSA attrition at an average rate of 9.2 employees a month**
- **Increased ambassador coverage based on attrition**





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## Officials and platform attendant roles would remain in current form

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In addition to CSAs, the T has the following positions in stations:

- **Officials** – Officials are in charge of a few stations and have their own sector; they supervise CSAs, perform daily inspections of AFC machines and other duties at stations
- **Platform Attendant (PA)** – Platform Attendants were created after transitioning to single person train operator. There are **3 full-time** PAs, (and **25.7** full-time equivalents) as these duties are part of Motorperson runs – PA's perform train turnaround in some end of line stations
- These positions can be increased on an operational basis

Both positions perform overlapping duties with CSAs:

- Operating the Bridgeplate
- Provide assistance when trains back up at platform
- Assisting customers
- Assist in the event of an evacuation
- Reporting maintenance issues

In addition, both the Officials and the Platform Attendants are **safety sensitive\*** and usually **trained motorpersons**

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\* Safety-Sensitive Function(s) - An employee whose job functions are, or whose job includes the performance of functions, related to the safe operation of mass transportation service. The following are the categories of safety-sensitive functions:  
(1) Operating a revenue service vehicle, including when not in revenue service; (2) Operating a non-revenue service vehicle, when required to be operated by a holder of a CDL; (3) Controlling dispatch or movement of revenue service vehicles or equipment used in revenue service; (4) Maintaining (including repairs, overhaul and rebuilding) a revenue service vehicle or equipment used in revenue service; (5) Carrying a firearm for security purposes.



## The MBTA's in-station services can improve customer experience

- **Both CSAs and Ambassadors** will be trained and prepared to provide excellent customer service to T's standards:
  - Advanced technological solutions for providing real-time information
  - Accountability and management improvements
  - Hospitality best practices implemented
  - Safety, cleaning and maintenance reporting





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## Appendices

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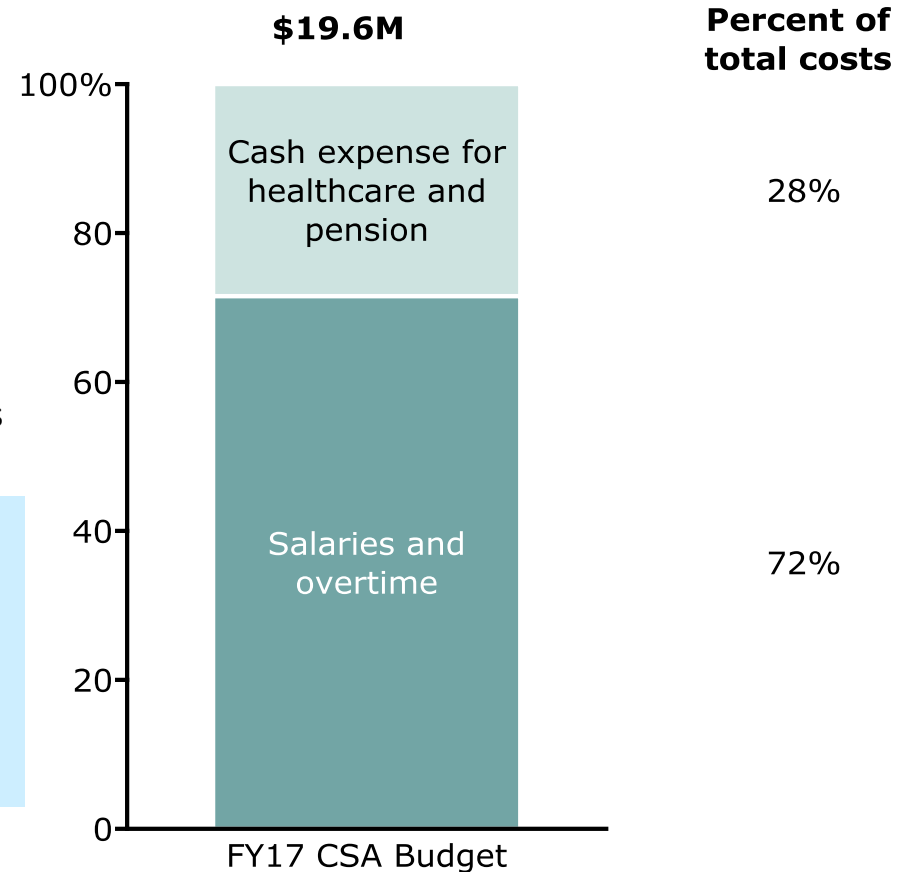
## Cash Costs for CSAs in FY17 Were \$19.6M

### CSA budget includes:

- CSA Salaries: \$13.6M
  - \$12.9M in salary
  - \$0.7M in overtime
  - Other operating costs: \$0.15M
  - Admin Wages \$0.26M
- Fringe: \$5.6M in cash fringe, HC and pension costs

### CSA workforce:

- 187 employees
  - \$60K-\$80K annual wage
  - \$36 Average hourly wage
  - 6,900 Weekly hours





## CSAs do not Perform the Same Roles Consistently Across the System

Field	Role and rationale
<b>Customer Service</b>	Charlie Card dispensation at some stations
	Provide directions and assistance to passengers when asked
	Providing customers access to restrooms in some stations
<b>Accessibility</b>	Support customers with disabilities when requested
<b>Operational Support</b>	<ul style="list-style-type: none"><li>• Assist in evacuations</li><li>• Contact with OCC during emergency</li></ul>
<b>Security</b>	Can impact fare evasion when gate is broken
	Serve as official MBTA presence, adding to sense of station security
<b>Maintenance</b>	Report broken equipment
<b>Operations</b>	Some serve as driver augmentation for motorpersons







## Future CSA Roles Can Be Improved and Clarified

Field	Role	Rationale	Future	Comments
Customer Service	Charlie Card dispensation	No machine to provide the cards – Estimated at \$10,000 per machine	Near future – potentially handed in kiosks? 2019– AFC 2.0	Not all Stations have CSAs and not all CSAs carry cards
	Provide directions and assistance to passengers	In event of disruptions (planned or unplanned) are involved in providing directions	<ul style="list-style-type: none"><li>Better informed CSAs</li><li>Volunteers, Community involvement</li></ul>	Could be resolved by providing the CSA with tablet
	Providing customers access to restrooms in some stations	Some stations are locked, and CSA carry the key	Restrooms for employees only	There is no legal requirement to provide restrooms
Accessibility	Support disabled customers	Provide ramps and assistance	Mapping of federal & state requirements, along with best practices	Required by the BCIL settlement Also provided by Platform attendant, Officials and motorpersons
Operational Support	Safety matters, evacuations	Person in the station that provides assistance in event of evacuation, emergencies, manually open the gates for emergency services	Provide better training and management	Ambiguous safety role – CSA not defined as safety sensitive Also performed by Platform attendant, Officials and motorpersons
Security	Could impact fare evasion when gate is broken	Presence of CSAs can decrease fare evasion		
	Add to general sense of security	Human presence may provide higher sense of security		
Maintenance	Report faulty equipment	If informed/discover faulty equipment, they radio it in	Will report immediately on the service app	Could be resolved by providing the CSA with tablet Done daily inspection
Operations	Buffer for motorpersons	Hired as motorpersons, and trained as such, move up when there are openings in their rating station	Will transition all motorperson trained CSA to FT motorpersons in 12-24 months depending on the line	

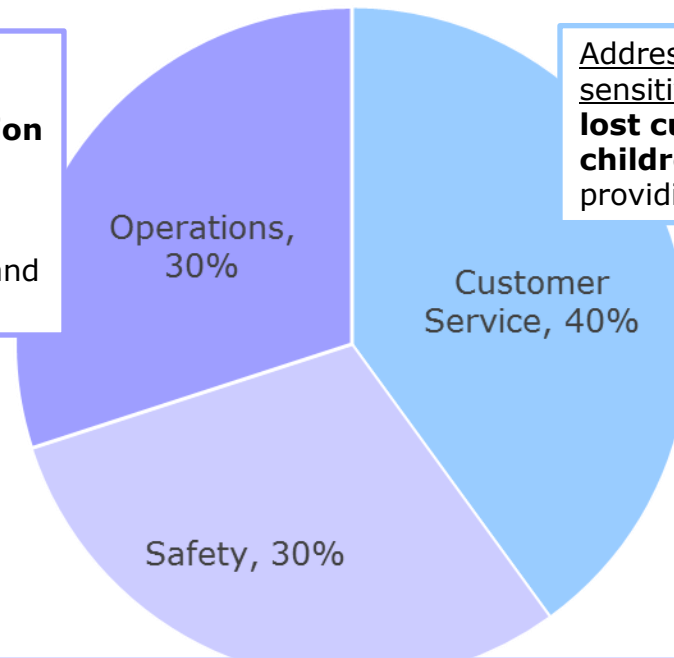


## Current CSA Job Description is Ambiguous

The Customer Service Agent assists in the delivery of efficient and high quality **customer service** and **safety** at MBTA stations, maintains **a presence** at strategic areas of the station, provides **advice and assistance** as necessary and acknowledges and responds to the **individual circumstances** of customers.

### Perform Operations required responsibilities:

- **Relay work-related information** as necessary
- Ensure that all **station equipment and facilities are functioning correctly**, safely and are in presentable condition



Address and assist a small, yet highly sensitive group of customers:  
**lost customers**, persons with **disabilities, children, elderly and ill customers** by providing a helpful and speedy response

### Acts as eyes and ears of the T at the station:

- **Ensure the safety and security of customers** and others
- **Watch and listen for dangerous situations**, and hazards
- **Assist with station openings and closings, station evacuations**, and other emergency operations

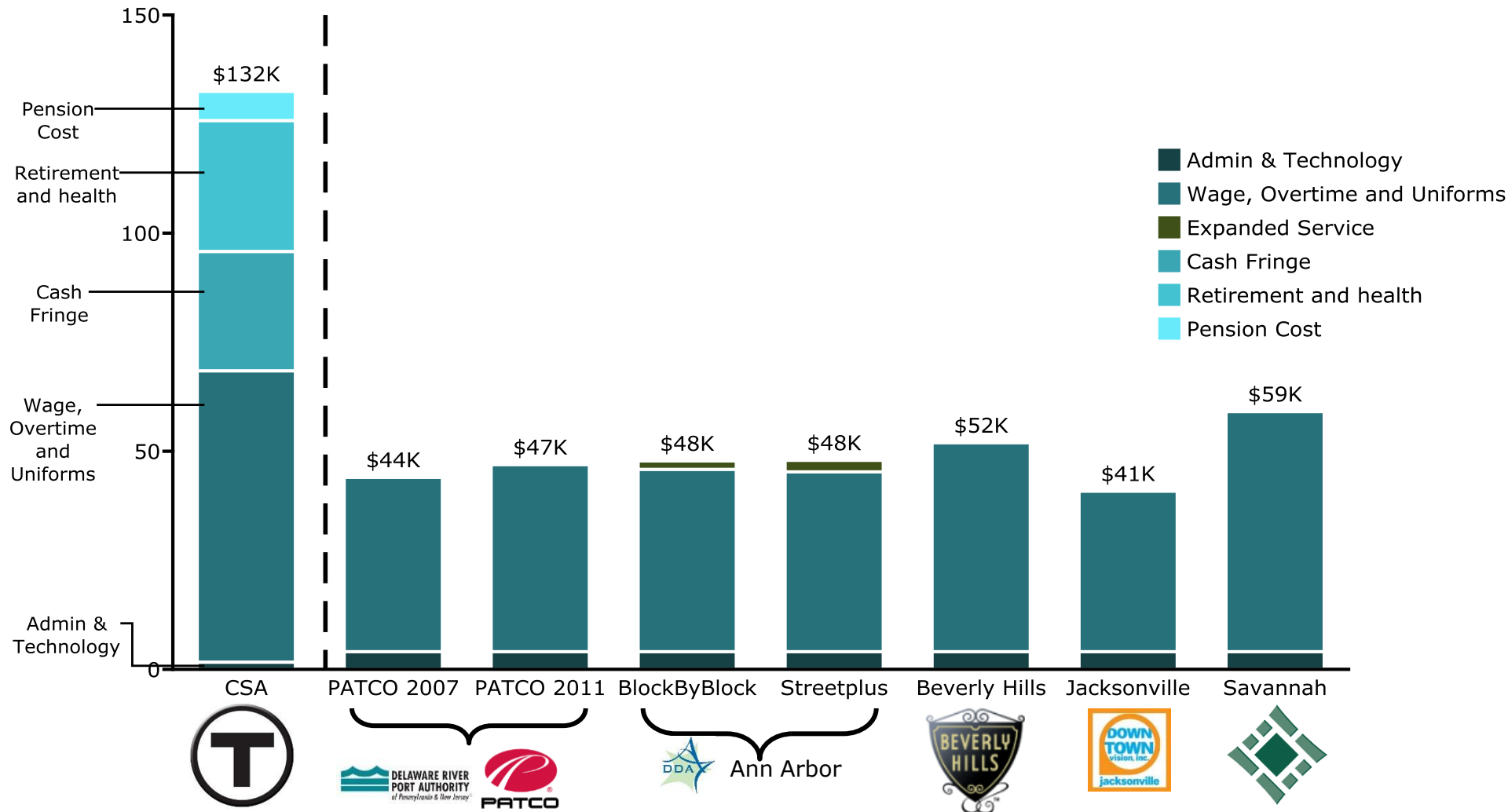


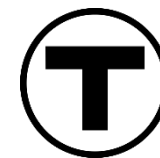
## Annual Cost for Current Service Level – 187 Employees





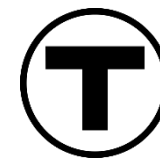
## Annual Cost Per Employee





## Metrics to measuring in-station service costs

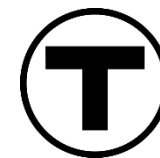
Key performance measures	Current tracking?	Current baseline	Details
Operating expense (annual)	✓	\$27M	Wages, benefits (50%), overtime, uniforms, training, admin
Operating expense (long-term)	✓	\$ --	Long-term costs of pension and benefits
Capital expense	✓	\$ --	
Technology Solutions (Y/N)	✓	<b>None</b>	No technological implementation in
Daily interactions (Y/N)	✓	<b>None</b>	CSAs interactions are not measured or documented



## Current state assessment for in-station service

Area	Present risk level	Summary observations	Desired future state
Quality of service		<ul style="list-style-type: none"> <li>The T's in-station service is highly inconsistent, the definition's are ambiguous and results in occasions of very poor service. All the while, CSA are the T's front-line client facing agents, who provide important services in various core activities</li> <li>CSA are not hired for customer service, the CSA position is a transitory one for motorperson. As such, CSAs are not trained on hospitality industry best practices</li> </ul>	<ul style="list-style-type: none"> <li>Quality will be measured by <b>hospitality industry best practices</b></li> <li><b>In-station service personnel will be trained and managed with service orientation</b></li> </ul>
Technology		<ul style="list-style-type: none"> <li>Currently CSA's technological capabilities are limited to handheld radio and landline phone for communicating with other T players. With updated technological capabilities, customer service could be upgraded significantly – both in customer information capabilities and in data available.</li> <li>The T has recently began implementing technology to its AFC maintenance technicians, with excellent preliminary results.</li> </ul>	<b>Fully implement tech solutions for better service and data</b>
Cost		<ul style="list-style-type: none"> <li>Currently, 187 employees are designated Customer Service Agents (CSA), providing in-station service to customers in multiple fields. The fair market cost of these services is expected to be significantly less.</li> </ul>	<b>Cost of service will be variable to service required</b>
Accountability & Management		<ul style="list-style-type: none"> <li>Currently, CSA are officially managed by Station Officials, however, most of the time CSA's simply report to the designated picked station and are not managed on a regular function.</li> </ul>	<b>Accountability and management will be included in definition of service</b>





## Business imperatives to RFP in-station service

