



SFMTA

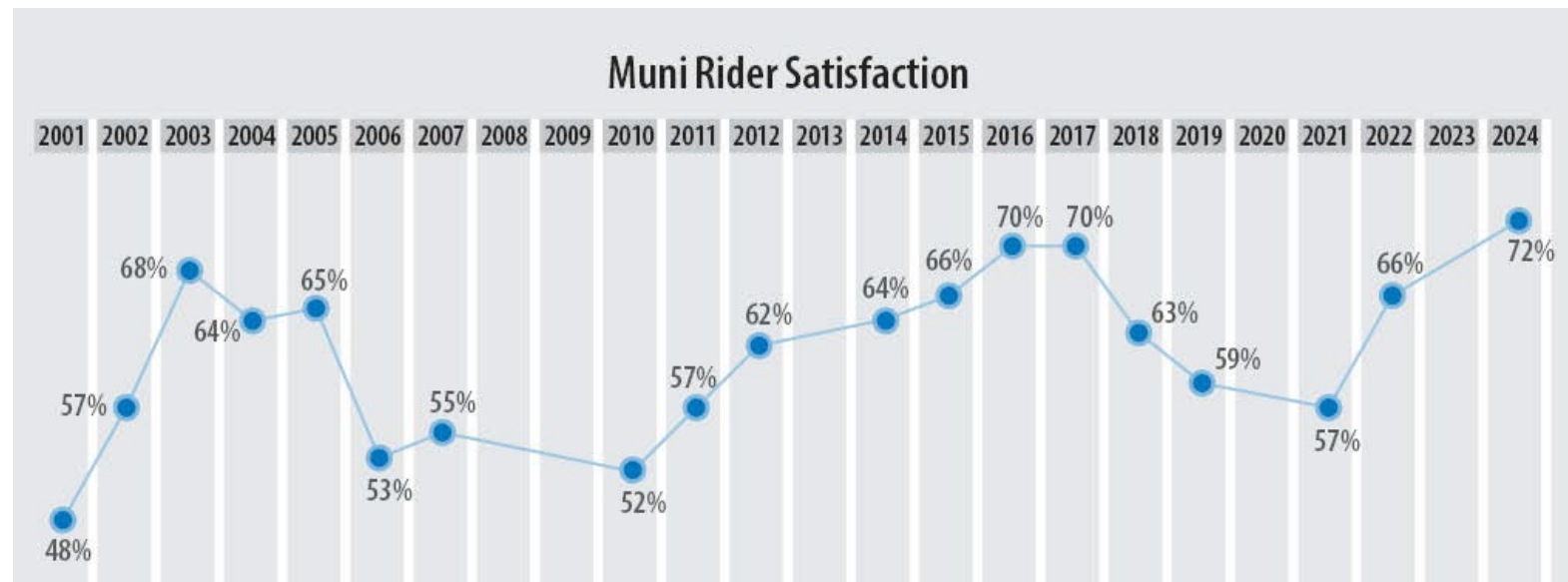
# Customer Experience Program Roadmap

Phase 1 Final Deliverable  
January 2025



# Why Create a Customer Experience Roadmap?

- Years of dedication and investment in transit have yielded record levels of Muni rider satisfaction with 72% of riders saying they are satisfied.



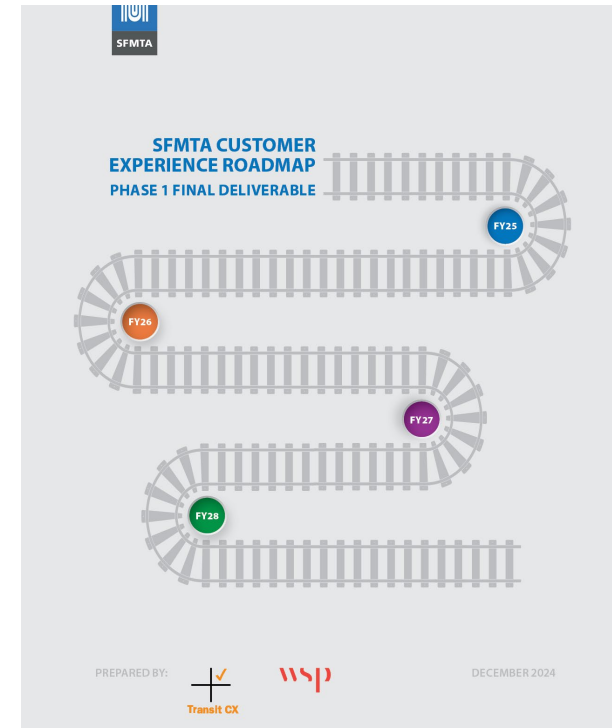
# Why Create a Customer Experience Roadmap?

- But we know we can do even better to achieve at least 80% satisfaction.
- To get to that level, we will:
  - more systematically listen to customers to gain a deeper understanding of their needs,
  - map out changes to our business processes and culture so that we consistently focus our efforts on improving the customer experience, and
  - take on the next set of pain points to remedy.
- That is the impetus for our new Customer Experience program.



# Why Create a Customer Experience Roadmap?

- Over the last six months, we looked at best practices throughout our industry and developed a Roadmap for changes in SFMTA processes and culture to enhance our focus on improving the customer experience.
- The resulting Roadmap includes 15 work streams to improve our customer focus, phased in over 3.5 fiscal years.
- This work will culminate in a comprehensive Customer Experience Action Plan that builds on recent successes and further increases Muni ridership, public trust and support.



# What is Customer Experience?

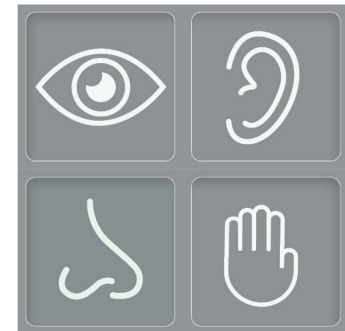
Customer Experience (CX) is the sum total of the experiences our customers have at every stage of their journey. The goal is to minimize pain points, maximize smooth, uneventful experiences, and find opportunities for occasional surprise and delight.

## *The Transit Rider Journey:*



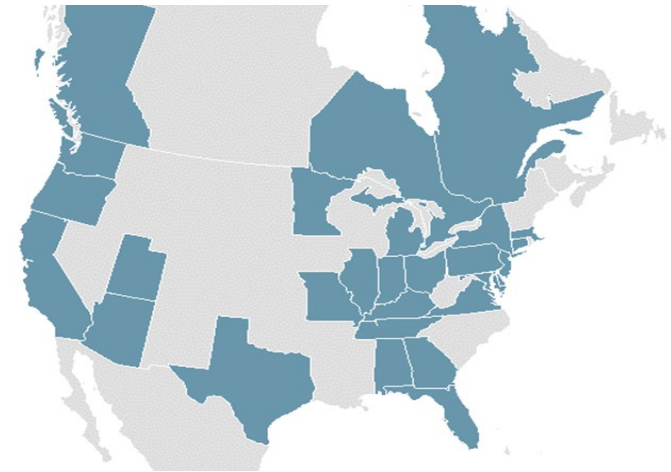
For each stage of the journey we ask ourselves what riders see, what they hear, what they smell, and what they feel.

By understanding rider pain points at each stage, we can identify opportunities to enhance their journey and create a more seamless and memorable experience.



# The Customer Experience Trend

- Customer experience programs have become commonplace in the private sector.
- Their purpose is to create strong brands and drive growth.
- In the public sector, more than 60 transit agencies in North America now have Customer Experience programs.
- APTA (American Public Transportation Association) has created a [Customer Experience Forum](#) to coordinate efforts across the transit industry.
- There are also customer experience programs across 24 federal departments..



# What is a Customer Experience Program?

- A Customer Experience program is a systematic set of practices that focus an organization on improving the customer experience.
- In particular, it prescribes changes to business practices and culture to drive improvements to the customer experience.
- Specific changes to an agency's products and services come later as an outcome of the program.
- The SFMTA Customer Experience Roadmap outlines changes to Muni business practices related to these three objectives:

**1. Remedy Rider Pain Points**

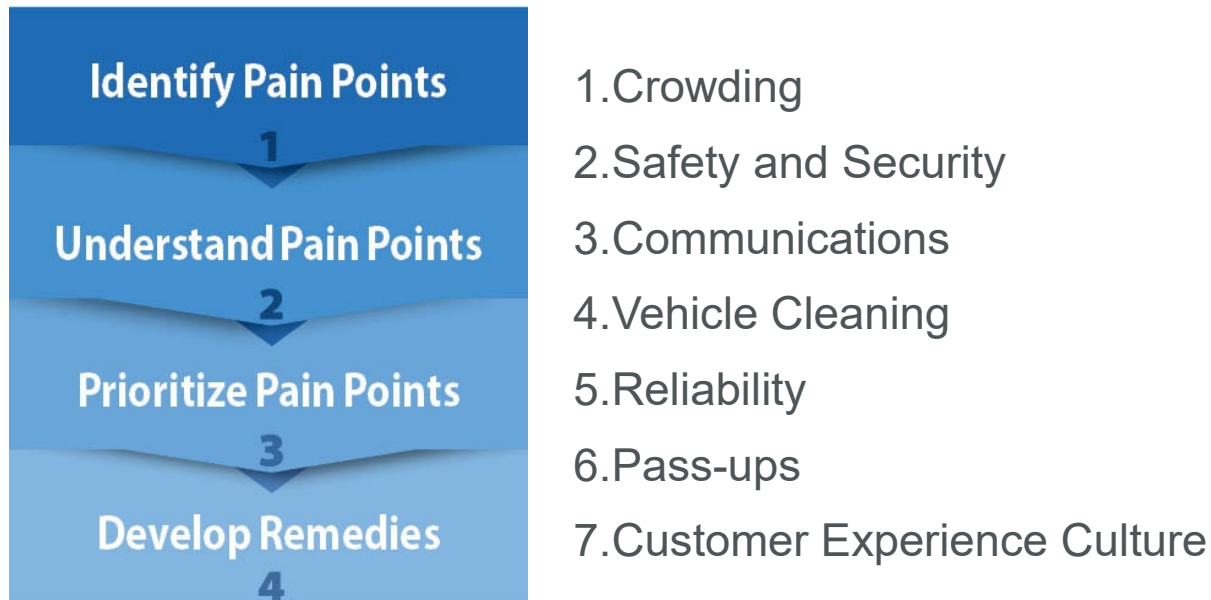
**2. Cultivate a Customer-Centric Culture**

**3. Involve Customers In Product Design**

# What is a Customer Experience Program?

## OBJECTIVE 1: Remedy Rider Pain Points

**FY25:** We will develop "Early Win" Improvements to remedy top pain points and cultivate a customer experience culture:



**FY25:** We will improve responses to common complaints, increasing the portion of complaints that we take action to address, and strengthen our feedback loop to riders to let them know the changes we are making.



# What is a Customer Experience Program?

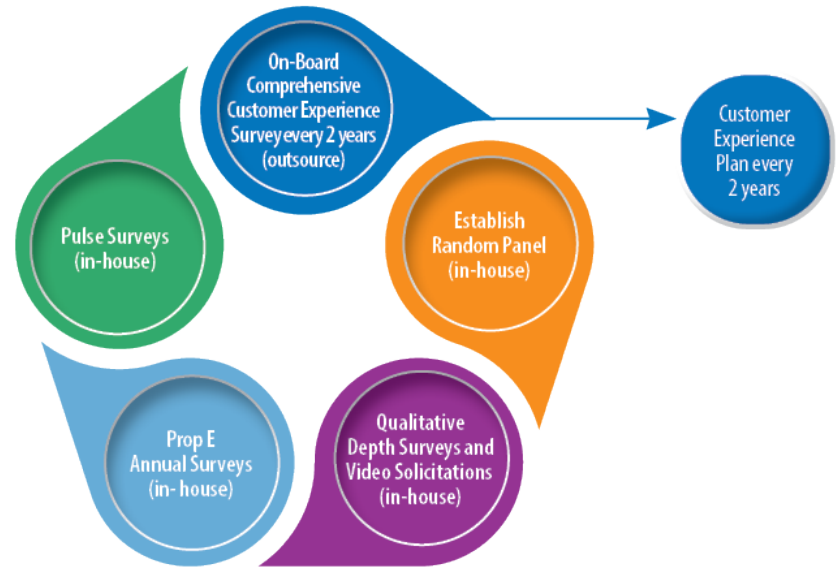
## OBJECTIVE 1: Remedy Rider Pain Points

**FY26:** We will deploy mystery shoppers to talk with passengers and observe conditions to understand issues more deeply.

**FY26:** We will transition to a new comprehensive Customer Experience Survey that is more detailed, accurate, and inclusive.

**FY26:** We will build on existing efforts to meet the diverse needs of diverse riders and mine data to deepen our understanding of needs.

**FY26:** We will hold regular Executive Meetings to keep a spotlight on customer experiences and expedite improvements.



# What is a Customer Experience Program?

## OBJECTIVE 1: Remedy Rider Pain Points

**FY27:** We will use Customer Experience survey results to develop a Comprehensive Customer Experience Action Plan.

**FY27:** We will work with management, employees, and labor representatives to consider the interests of Muni riders in discussions about work rules.

**FY28:** We will coordinate budgets, plans, and decision-making processes with Customer Experience to achieve strong and powerful alignment

**FY28:** We will develop a dashboard that synchronizes Key Performance Indicators (KPIs) and Key Experience Indicators (KEIs) into a single, nested system.

# What is a Customer Experience Program?

## OBJECTIVE 2: Cultivate a Customer-Centric Culture

**FY25:** We will choose a single Customer Experience North Star to cultivate customer-centricity among employees at all levels.

**FY26:** We will make the North Star ubiquitous, integrating it into every touch point with Muni employees.

**FY26:** We will measure changes in employee awareness and perception over time to keep the culture change effort on track.

**FY27:** We will set up an affinity group of customer experience champions to support employees who live and breath customer centricity, then expand the circle to expand our influence on employee culture.



# What is a Customer Experience Program?

## OBJECTIVE 3: Involve Customers In Product Design

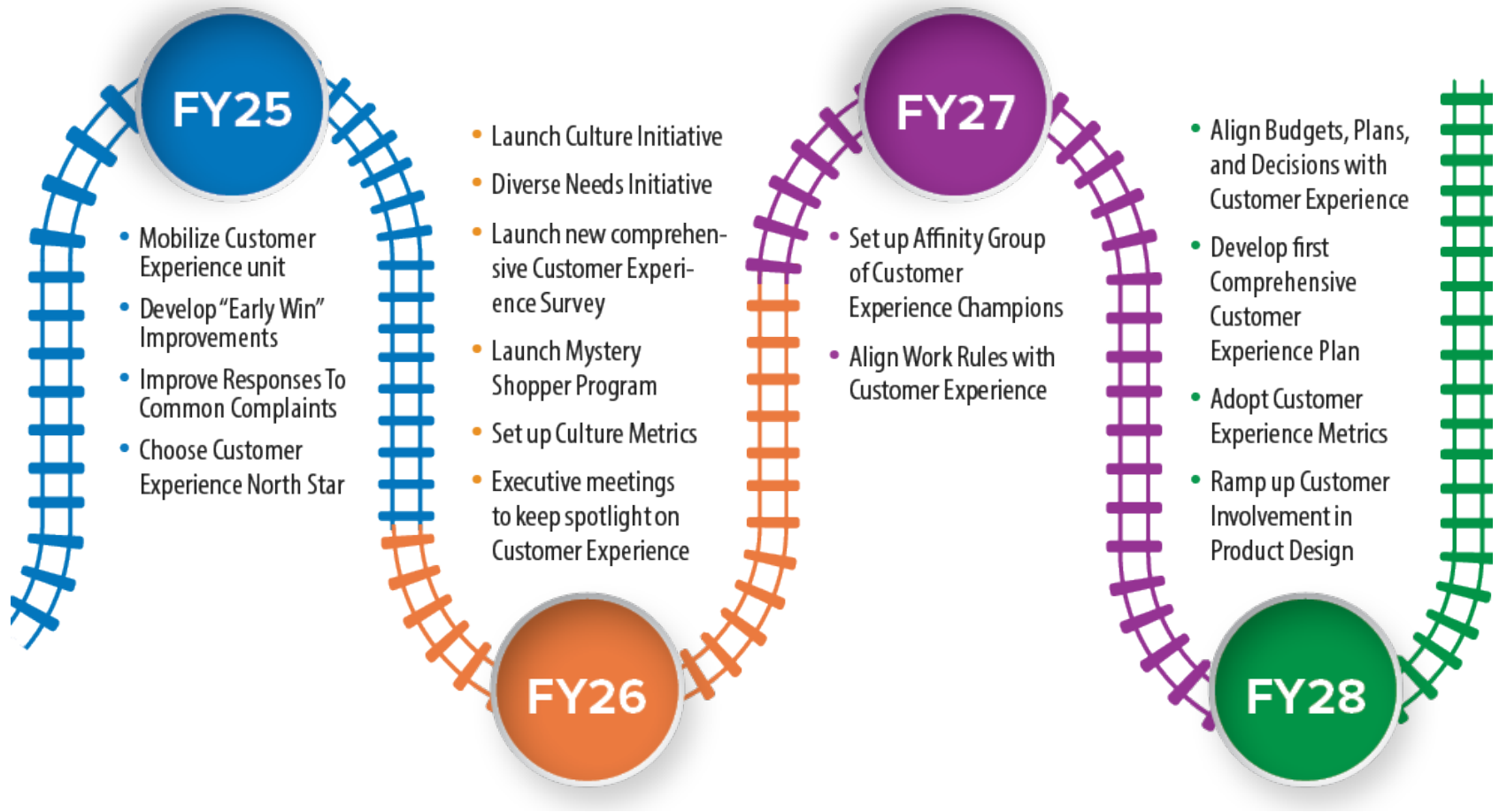
**FY28:** We will ramp up customer involvement in product design to bring the voice of the customer into:

- defining product requirements, and
- testing of betas, mockups and prototypes

We will work to standardize our approach to user experience testing, and raise the bar to improve products such as:

- Bus, rail and paratransit vehicles
- Bus stop amenities
- Signs
- Ticket Vending Machines and Ticket Readers
- Websites, Wi-Fi, and Apps

# SFMTA Customer Experience Roadmap Summary



# Getting Started

- To advance the SFMTA Customer Experience program, we have established a Core Team from key departments, including:
  - Transit
  - Security
  - Communications, Marketing, and Outreach
- The Core Team will be supported by a new SFMTA Customer Experience unit in Transit.
- *First priority:* Develop "Early Win" improvements and incorporate priorities from the leadership transition ("Action Plan Light")

**Stay tuned for regular reports on our progress in the coming months.**

# Summary

- We have created a formal Customer Experience program to drive future Muni improvements to earn even higher customer satisfaction, ridership, and public support.
- The Customer Experience program will elevate the voice of the customer in Muni decision-making and cultivate a customer-centric culture at all levels of the Muni organization.
- The focus is on changing business processes and culture so that we consistently focus our efforts on improving the customer experience.
- The SFMTA Customer Experience Roadmap is based on three primary objectives:

**1. Remedy Rider Pain Points**

**2. Cultivate a Customer-Centric Culture**

**3. Involve Customers In Product Design**

... and 15 work streams to support those objectives.

# Customer Experience Resources

TransitCX.org: [Blog Posts](#) on over 40 topics

Other transit agency CX programs:

- [LA Metro Customer Experience Program](#)
- [Vancouver Customer Experience Program](#)
- [Connecticut Customer Experience Program](#)

[White House Customer Experience Program](#)

Consider joining the [APTA Customer Experience Forum](#)  
(requires APTA login)



# Reflections and Questions?

