

# Passenger Service Report Process Improvement Workshops

**Policy and Governance Committee Update  
November 17, 2017**

**Controller's Office, City Performance**

Corina Monzón

David Weinzimmer

Jeff Pomrenke



# Agenda

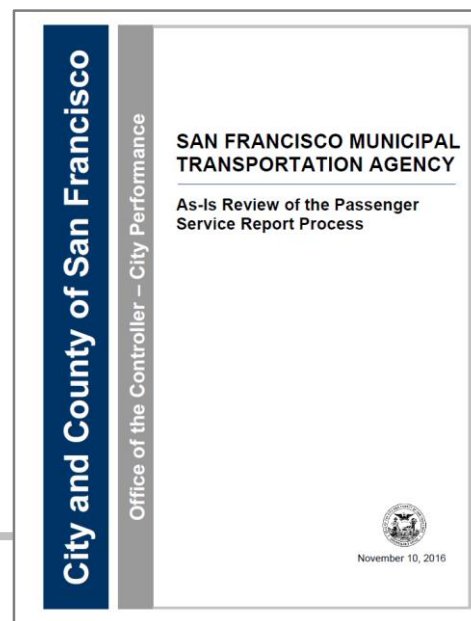
- PSR Process – Opportunities for Improvement
- What We Did: Process Improvement Workshops
- How We Did It: Creating Partnerships within the Agency and Across the City
- Questions



# Passenger Service Report Process – Opportunities for Improvement

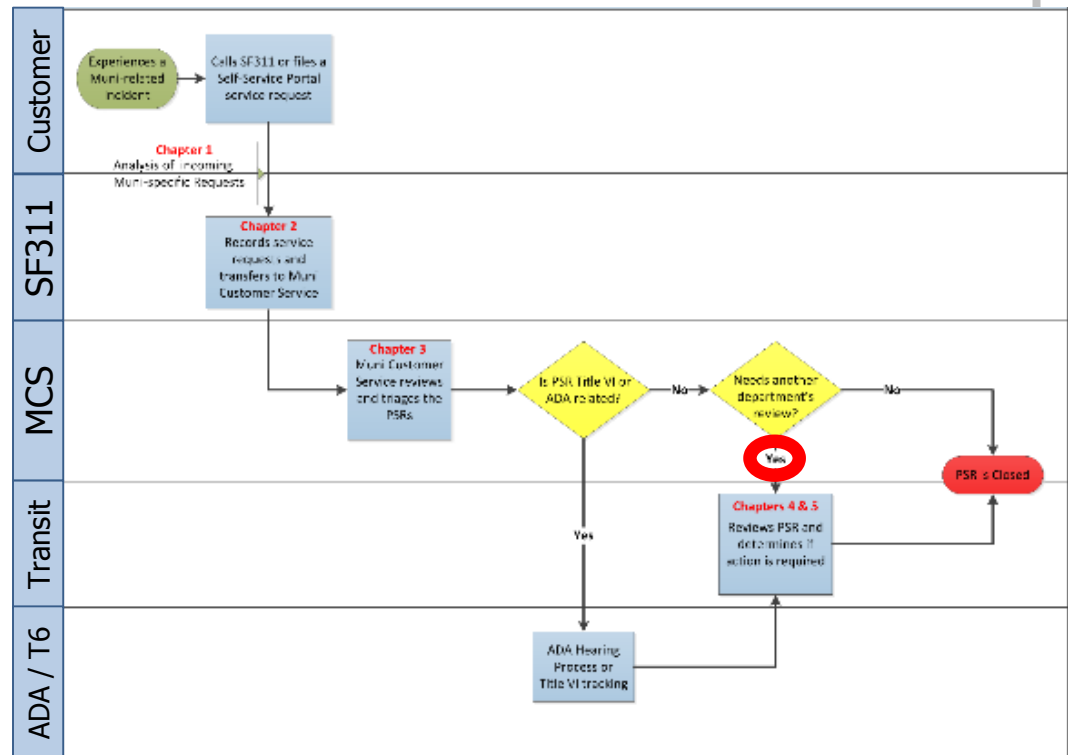
In January 2017, CON presented to PAG on opportunities within the passenger service report (PSR) process to:

- **Improve customer experience** by closing the loop with customers and developing scripts for frequent PSRs
- **Improve staff tools and processes** by closing PSRs at MCS when downstream investigators would not be able to provide better information
- **Make technical improvements** to the PSR process
- **Expand performance metrics**



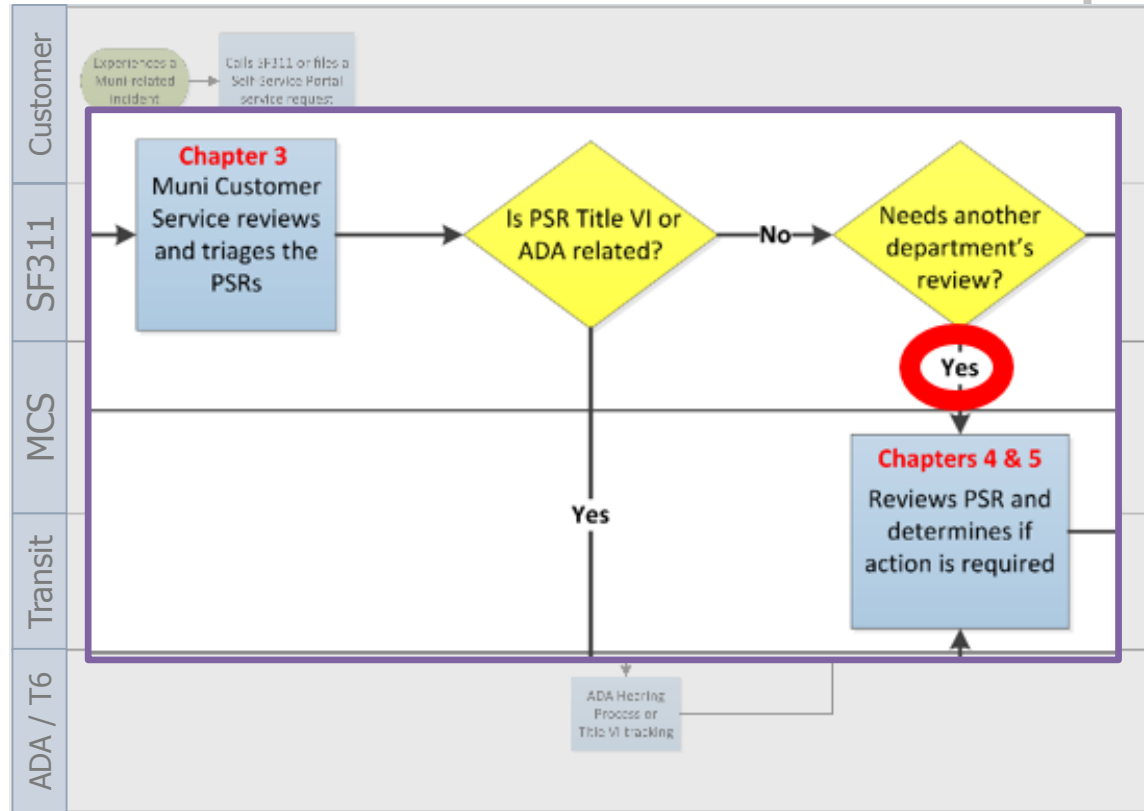
# Process Improvement Focus

CON and Muni Customer Service (MCS) worked with the Transit Division to improve the MCS triage process for **employee-related** passenger service reports (PSRs).



# Process Improvement Focus

We targeted our improvements on the key decision point when MCS decides whether to forward or close a PSR. Our goal was to empower MCS to fully address and close more PSRs.



# Process Improvement Workshops

To accomplish this, CON convened a series of monthly workshops with MCS and Transit Management staff who perform the PSR process every day. Using Lean process improvement techniques the group:

- Articulated **why change is needed**, and how it should be measured
- Identified **root causes** of process obstacles
- **Brainstormed** solutions
- Designed solutions & **standard work** for the PSR process



# Process Improvement Deliverables

MCS, Transit, and the Controller's office created:

- **Standard work** for processing two key types of complaints
- **Follow-up questions for SF311** to ask at intake
- Criteria for which PSRs require **video evidence**
- **Customer response templates** drafted by subject matter experts about common types of PSRs
- A mockup of new **weekly reporting dashboards** to monitor the PSR process
- A **SharePoint Knowledge Base**



# Lean Process Improvement – Creating Partnerships within the City

Lean process improvement brings together staff who work on the process every day. They use their shared expertise to design process improvements.

This process has also helped establish stronger relationships within the SFMTA between MCS, Transit Management, Performance & Business Support, and outside the agency with SF311.





# Partnering with SF311

We invited SF311 to be a guest at the workshop and talk with Transit and MCS about their **experiences with customers at intake**, and their perspective on the beginning of the PSR process.

After talking with SF311, the participants created **empathy maps** to better understand customers' perspectives and needs in the PSR process.



# Partnering with SF311



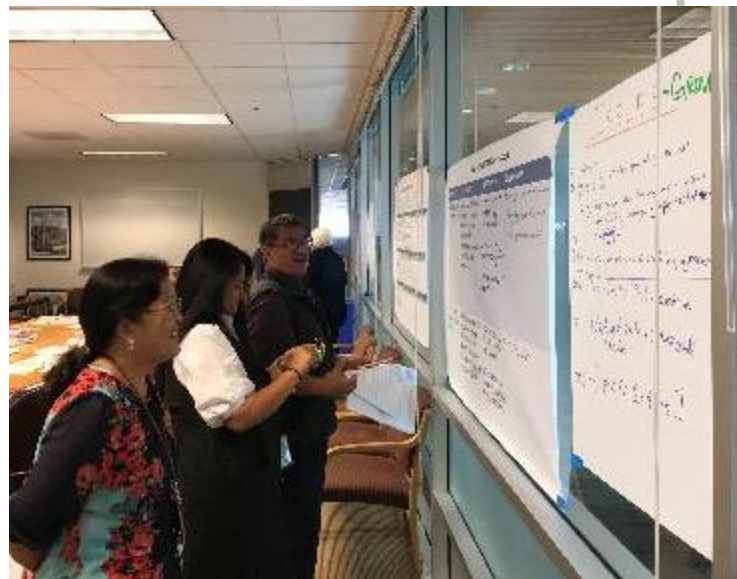
Hearing from SF311 helped in understanding customers' perspectives.



# Partnering with SF311

Participants also created materials for SF311 to use to **improve intake** and gather all necessary information for PSR investigation, making PSRs more actionable.

MCS & Transit reviewed SF311's training for customer service representatives (CSRs) and revised or suggested new questions that ought to be asked at intake for each PSR type.



**Example, for refusal to kneel bus/lower steps:**

*Did the driver advise you that the lift or kneeler was broken?  
Were you boarding a bus or train?*



# Strengthening Connections between Transit & Muni Customer Service

The workshops brought together Transit Management and MCS staff together for four hours a month to work collaboratively.

The workshops included a “Gemba walk” (job shadow) by Transit staff to MCS staff’s desks to see directly how PSR triage is done step by step.

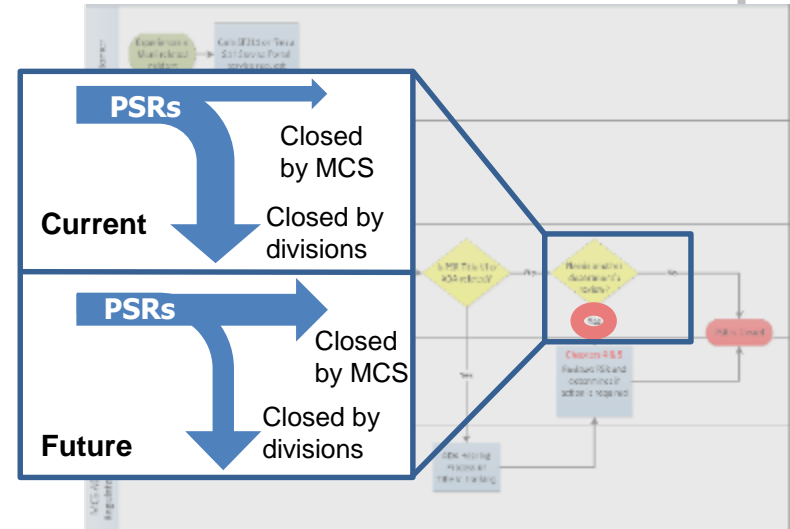


# Strengthening Connections between Transit & Muni Customer Service

The Gemba walk (job shadow) helped Transit and Muni Customer Service better understand each other's processes.

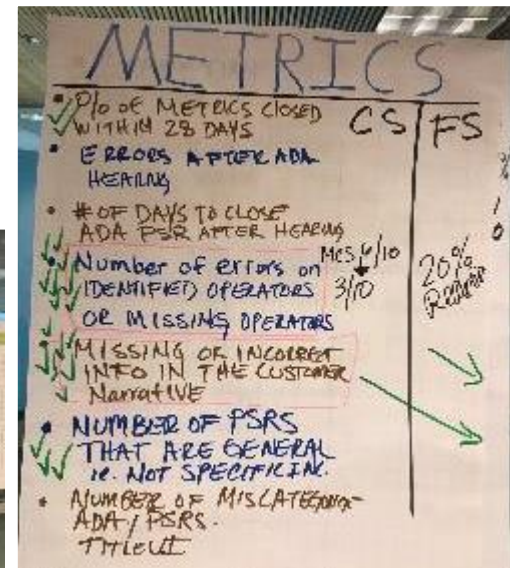
It brought to light the key points of confusion in the process and clarified opportunities to reduce process duplication.

As a result, MCS and Transit developed clear guidelines to appropriately close or forward PSRs at the end of MCS triage.



# Performance Metrics & Reporting

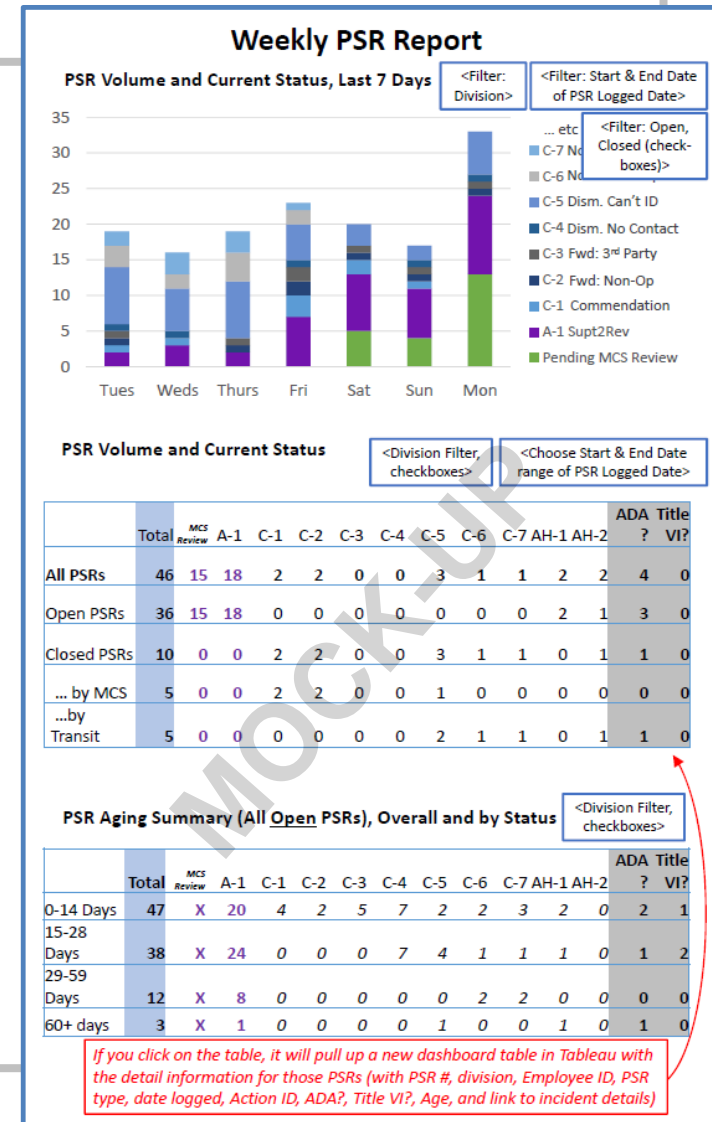
Transit Management and MCS worked together to determine what metrics would be most important to monitor the PSR process and its improvement, and to create dashboards that can support daily decisions.



# Performance Metrics & Reporting

After MCS and the Transit Divisions determined the metrics that are most important for them to monitor on a weekly basis, we brought in FIT's **Performance & Business Support** team.

MCS, Transit, and Performance & Business Support are partnering on creating a new **weekly PSR reporting dashboard** (see mockup to the right) and expanding other PSR dashboards.





# Muni Customer Service Knowledge Base (KB)

This Knowledge Base (KB) is a repository for all PSR-related information, and is now live on SFMTA's intranet.



## Quick Links



Policies



MCS Resources



Contact Information



Feedback or Updates?





# Muni Customer Service Knowledge Base (KB)

## PSR Resources

Click on the boxes below for customer response scripts and background resources.

**Unsafe Operations**  
100s

- Running red lights
- Speeding
- DUI
- Using mobile phones / radio
- Eating, drinking, smoking
- Collisions
- Fall on board
- And other careless or reckless operations

**Inattentiveness Negligence**  
200s

Failing to enforce or follow rules including

- Pass-ups
- Ignored stop requests
- Announcements
- Schedule adherence
- Kneeling bus
- Accommodating service animals
- Unauthorized stops
- General distraction from duty

**Discourteous / Inappropriate**  
300s

- Discourtesy to customers
- Operator altercation
- Fare/Transfer/POP disputes
- Mishandling funds
- Refusing vehicle as terminal shelter

**Criminal Activity**  
500s

- Non-operator altercation
- Larceny
- Theft
- Fare evasion

**Service Delivery Facilities**  
600s

- Delays
- Bunching
- No-shows
- Switchbacks

The KB includes descriptions of PSR types, processing instructions, links to resources, contact information, and more.

## MCS Resources

The links below include external resources and information on how to process PSRs at Muni Customer Service. If any changes or updates need to be made to this page, please send us feedback by clicking on the "Feedback or Updates?" link to your right. Descriptions of each resource are included at the bottom of this page.





### External Resources:

1. [NextBus Reports](#) (login required)
2. [TrapezeCOM Report](#) (login required)
3. [Operations Central Control Log](#)
4. [Video Surveillance Program \(VSP\) SharePoint Log](#) (login required)
5. [311 Customer Relations Management Support](#)
6. [TRANSTAT PSR Reporting Dashboard](#) (login required)
7. [SFMTA Transit Bulletins](#)

### MCS PSR Processing:

1. [Customer Response Templates](#)
2. [Discourtesy Processing Guidelines](#)
3. [Video Pull Criteria and Other Guidance](#)
4. [Third Party PSR Processing Guidelines](#)
5. [How to Close Out a PSR in Trapeze](#)
6. [311 Follow Up Questions](#)
7. [Batching Instructions](#)

## Quick Links

-  [Return to Homepage](#)
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Last updated:

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# Thank you!



# Thank you!

## **Executive Sponsors**

Candace Sue  
Leda Rozier

Mary Travis-Allen

## **Transit Management**

Ammee Alvior  
Christina Penland  
DeMarrio McClary  
Elizabeth Valdellon

Paul Wong  
Sal Tandoc  
Shawna Pitts

## **Muni Customer Service**

Angela Genochio  
Jeannette Sanchez  
Kristen Holland

## **Controller's Office**

Corina Monzón  
David Weinzimmer  
Jeffrey Pomrenke

## **Performance & Business Support**

Tim Quayle, Maddy Ruvalo, Fernando de la Pena



# Contact Information

## **City Performance Unit, Controller's Office**

Corina Monzón, Project Manager

[corina.monzon@sfgov.org](mailto:corina.monzon@sfgov.org) 415-554-5003

David Weinzimmer, Performance Analyst

[david.weinzimmer@sfgov.org](mailto:david.weinzimmer@sfgov.org) 415-554-7656

Jeff Pomrenke, Performance Analyst

[jeffrey.pomrenke@sfgov.org](mailto:jeffrey.pomrenke@sfgov.org) 415-554-5365

## **Muni Customer Service**

Kristen Holland, Digital Communications Manager

[kristen.holland@sfmta.com](mailto:kristen.holland@sfmta.com) 415-701-4649

Jeannette Sanchez, Muni Customer Service Manager

[jeannette.sanchez@sfmta.com](mailto:jeannette.sanchez@sfmta.com) 415-646-2385

