

White Paper

» *PROACTIVE MESSAGING:
DEVELOPING A CUSTOMER CONTACT STRATEGY*



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WHY A CUSTOMER CONTACT STRATEGY?

Transit agencies have traditionally reacted to customer requests for information. Generally, this meant that the customer made a call to the agency and it responded by providing the requested information. Agencies had established procedures for handling customer requests, such as: providing a public telephone number, having agents available for callers, and producing printed material containing its most requested information. In recent years however, new information technologies have been deployed to automate many agent-handled processes with the intent of increasing productivity and reducing costs. Many of these technologies have achieved their goals, and they have done so by fitting into existing business models.

In the area of public information, advances in technology now provide agencies with the capability of proactively delivering information to their customers – a stark contrast from the reactive communications most agencies practice. It's an ideal opportunity to review current models of communication and to identify the potential for positive change. To make the most of this opportunity, agencies must first create a vision and strategy for initiating contact with the customers they serve.

This paper describes how information technology is currently used in customer information, how it may be used, and what steps an agency should follow to develop a strategy.

BACKGROUND

Due to the nature of their business, public transportation providers must supply information about their services to their users. Paratransit operators have the additional requirement of identifying and personalizing customer contact when delivering their service.

Historically, considerable effort was placed on printed material, including: schedules, timetables, fares, and service description. This was supplemented by agents answering inbound calls. To assist in making call centers more efficient, the first wave of technology handled and distributed these calls to human agents.

With the introduction of Interactive Voice Response (IVR) technology, it became possible to automate many of the routine customer queries handled by agents. This allowed more callers to be served at a reduced cost to the agency and without the need to increase staff. It also provided added convenience to the customer, because wait times for information were significantly reduced or altogether eliminated, and IVRs can be made accessible to the public 24 hours a day, 7 days a week.

Recent developments in Automated Speech Recognition (ASR) allow customers to speak their requests naturally to the IVR. In addition to more traditional concatenated speech, the introduction of improved text-to-speech technology enables the IVR to speak out virtually any information contained in its database. Additionally, the IVR's capabilities have become more sophisticated, thus permitting their use in handling requests for trip planning and automating trip scheduling.

While there have been significant advances in IVR technology, there have also been similar advances in other IT products currently deployed in transit and paratransit environments. Included among these are new web-based trip planners, Automated Vehicle Location (AVL) and Mobile Data Terminal (MDT) systems, operations software, and wireless and other web-based applications.

These new technologies either generate additional service data that can be a source of information for customers, or they provide alternative access to an agency's



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databases. These data sources can potentially be accessed by customers via the IVR. Additionally, the IVR can work in concert with other wireless sources or web-based systems to provide a consolidated, single conduit to the agency database(s).

CURRENT USES OF IVR IN CUSTOMER INFORMATION

In general, an IVR performs three functions in a typical transit/paratransit environment:

- Call-gating: It handles incoming calls, provides a greeting, and forwards the caller to his/her selected destination.
- Request/Information processing: It answers information requests by extracting what is required from the scheduling database or by providing a trip itinerary generated by a trip planner. In paratransit operations, it also interacts with the scheduler by sending information for processing, such as trip requests.
- Information conduit: The information extracted for use by the IVR can also be communicated via wireless and web-based channels, such as Personal Digital Assistants (PDA) and Short Message Service (SMS).

IVRs are used to emulate the interaction between an agent and a customer. They are modeled on scripts of what an agent would do and say while helping a customer. The IVR comes in two “flavors” – touch-tone (DTMF) and speech-enabled. In today’s best practices, the IVR has both speech-enabled and DTMF capabilities, and has as a choice/fallback connection to a human agent.

The DTMF based systems provide reliable and quick information on bus times, next bus information, trip confirmation, trip cancellation, trip reservation, and general information. In speech-enabled systems, interaction with the IVR can be made simpler, since no buttons need to be pushed (though they may have some difficulty understanding certain dialects or speech impediments). Speech-enabled IVRs also have the added advantage of permitting the deployment of more sophisticated applications, such trip planning in both transit and paratransit environments. It can also extend the range of automated trip reservations, because callers can speak origin and destination addresses to the IVR.

The IVR applications described above fit into the existing transit environment and continue to assist with inbound, customer initiated calls. In fact, these IVR applications have become very good at assisting the agency, automatically handling between 30 and 90 percent of all calls. The statistics supporting IVR’s ability to improve call center productivity are impressive, and there is potential that they can also enhance customer service.

Some paratransit agencies are now using IVR technology to provide customers with scheduled trip reminders; others are planning to provide “real-time” ETAs using vehicle location information and the IVR’s dial-out capability. The expectation is that these proactive capabilities will increase on-street productivity by reducing no-shows and also improve customer service by reducing the service window wait times for paratransit riders. ETAs and trip reminders are only a few of the capabilities of proactive messaging. The potential is immense for other types of agency uses.

OPPORTUNITIES FOR PROACTIVE MESSAGING

Whereas traditional IVRs performed inbound-type agent tasks, such as call handling and distribution, the new messaging capabilities permit targeted or general contact with customers for any purpose deemed important by the agency.



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Generally, proactive messaging falls into a number of categories:

- Alerts
 - Emergencies
 - Service delays
 - Service changes
 - Urgent messages
- Notifications
 - Trip/vehicle arrivals
 - Meetings
 - Greetings
 - Registration status
- First Response Integration
 - Evacuation information
 - First responder dispatching
 - Customer notification
- Loyalty and Rewards Programs
 - Route and stop specific information

Messages can be targeted to all customers, specific groups, or individuals. Customers can subscribe or volunteer, or may be targeted by the agency for reasons including: advisory, warnings, convenience, or marketing. More than one message may be played to an individual or group. Using the same technology, marketing and operations surveys can also be conducted in automated, randomized, or targeted manners.

Proactive messaging provides the opportunity for an agency to elevate its profile and increase its visibility. An agency now has more control over customer relations by providing useful and timely information.

Managing this opportunity for proactive communications requires forward thinking by agency management and the development of a delivery plan that includes measurable objectives. This can be achieved through the creation of a strategic plan.

OPERATIONAL AND TECHNICAL CONSIDERATIONS

The system for delivering dial-out messages is a stand-alone component of an IVR system. It can also be integrated into an existing dial-in IVR system or it can be connected directly to an agency's PBX, running on standard off-the-shelf PC equipment and telephony boards. The dial-out system requires a connection to an agency's scheduling and client database, either directly from the transit agency or through a licensed third-party interface. For real-time vehicle location information, the data source is either the AVL system or the scheduler. Standard queries, export utilities, or database interfaces are already available (or can be built) to access any data necessary for custom requirements.

Typically, the agency should consider the following:

- Determine the Purpose: Alerts, notifications (who, what message, when)
- Determine the Data Source: Agency-owned, scheduler, AVL, other source.
- Determine the System Size and Scalability: How many callers, number and type of messages, length of message, and time available for calls?

These considerations should be reviewed within the context of an overall strategy on how to use proactive messaging to achieve the agency's goals.



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DEVELOPING A CUSTOMER CONTACT STRATEGY

What is a strategy?

A plan, method, or series of maneuvers or stratagems for obtaining a specific goal or result: a strategy for getting ahead in the world.

- Dictionary.com Unabridged (v 1.1)

Why a strategy?

A strategy provides vision. It provides direction and acts as the foundation for more detailed operational planning. To be useful, it must be realistic, convincing, and attainable.

Specifically, strategy provides:

- A basis for more detailed planning
- A rationale for the steps to be taken
- The bedrock for establishing measurable objectives and benchmarks
- The basis for organizational change

Key steps towards developing a strategy:

Step 1: Identify the Current Status of Communications with Customers

How does your agency communicate now? Does your agency communicate with customers? Using what methods, techniques, and media? What kind of information is asked for and provided? What information do your customers ask you that you cannot deliver? For what reasons would your agency want to contact customers? What prevents you from doing so now?

Step 2: Generate a Vision

What do you want your agency to look like in three years? Do you want to be known for your customer service delivery? Do you want to provide useful information to your customers in a timely and convenient manner? Does your agency want to better market its services? Do you believe productivity improvements can go hand-in-hand with improved customer service? Do you believe both will result from the timely and efficient deployment of technology?

Step 3: Identify Your Mission Statement

Articulate your agency's mission, for example: "Our business is to provide our customers with the highest quality services possible which include providing them with accurate information about the state of their account and the status of our service."

Step 4: Set Objectives

What are the results your agency wants to achieve with proactive messaging, for example:

- Provide real time information to all customers
- Decrease no-shows and increase productivity
- Increase customer satisfaction with agency services

By following these crucial first steps, an agency can lay a solid foundation for initiating positive change and transforming its customer communications.

CONCLUSION

IVR technology has proven itself as a valuable tool to increase productivity in transit call centers. It has stepped in to handle calls that previously required an agent, and it does so efficiently and consistently.



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A strategy provides vision. It provides direction and acts as the foundation for more detailed operational planning.

Steps for developing a customer contact strategy:

- Identify current communications
- Generate a vision
- Identify a mission statement
- Set objectives

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Currently, the IVR has evolved beyond this role and can provide other capabilities, including: providing customers with information available from outside IT sources, and the capability to initiate customer contact at the discretion of the agency.

Proactive communication through the use of modern IVR technology provides new opportunities for transit and paratransit operators and will require a shift in the existing business model. A key first step is to develop a strategy that articulates the vision, mission, and objectives of an agency that uses this valuable technology to communicate with its customers.

ABOUT ONTIRA COMMUNICATIONS

Ontira empowers transit operators with solutions that enhance customer communications. Providing Automated Traveler Information Systems (ATIS) technology since 1984, Ontira has earned a reputation for reliable and user-friendly multimedia applications and superior customer service. Ontira's information solutions enable transit users across North America and Australia to access traveler information via telephone, Internet, kiosk, fax, wireless technology and digital signage.



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