# PROPOSAL EVALUATION WORKSHEET (INDIVIDUAL)

## EVALUATION FACTOR: CUSTOMER SERVICE PLAN (RATED)

**PROPOSER**: ____**Keolis**_____

**DATE**: _**August 14, 2013**_____

**OVERALL RATING**: __**Good**____

**NARRATIVE SUMMARY**: _____The proposer's Customer Service Plan consistently exceeds the stated criteria in the RFP in ways that will hold employees to a higher standard, promote customer satisfaction, increase accountability and improve the quality of customer service, customer satisfaction, safety and the overall customer experience. _____While there may be some weakness in the "Lost and Found Services" section, 7.A.2. they are not fatal and still meet requirements.

**Objective**:

The following are the objectives for the Customer Service Plan evaluation factor:

1) To ensure that Proposers demonstrate the ability to maximize customer satisfaction measured by MBTA-approved metrics;

2) To identify Proposers that will continuously improve messaging regarding customer and public safety; and

3) To identify Proposers committed to implementing innovation in the provision of all regular and special service information.

**Evaluation Criteria**:

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The Proposer has demonstrated the ability to maximize customer satisfaction measured by MBTA-approved metrics. The Proposer has shown that it will continuously improve messaging regarding customer and public safety and that it is committed to innovation in the provision of all regular and special service information.

**Instructions**:

Evaluators must rate each requirement outlined in the table below as one of the following: (i) Exceptional; (ii) Good; (iii) Acceptable; (iv) Potential to Become Acceptable; or (v) Unacceptable. Please note the following explanations when rating each requirement:

1) A rating of Exceptional is appropriate when the Proposer has demonstrated an approach that is considered to significantly exceed stated criteria in a way that is beneficial to the MBTA. This rating indicates a consistently outstanding level of quality, with very little or no risk that this Proposer would fail to meet the requirements of the solicitation. There are no weaknesses.

2) A rating of Good is appropriate when the Proposer has demonstrated an approach that is considered to exceed stated criteria. This rating indicates a generally better than acceptable quality, with little risk that this Proposer would fail to meet the requirements of the solicitation. Weaknesses, if any, are very minor. Correction of the weaknesses would not be necessary before the Proposal would be considered further.

3) A rating of Acceptable is appropriate if the Proposer has demonstrated an approach that is considered to meet the stated criteria. This rating indicates an acceptable level of quality. The Proposal demonstrates a reasonable probability of success. Weaknesses exist but can be readily corrected through requests for Clarification or Communications.

4) A rating of Potential to Become Acceptable is appropriate if the Proposer has demonstrated an approach that fails to meet stated criteria as there are weaknesses, but they are susceptible to correction through Discussions. The response is considered marginal in terms of the basic content and/or amount of information provided for evaluation, but overall the Proposer is capable of providing an acceptable or better Proposal.

5) A rating of Unacceptable is appropriate if the Proposer has demonstrated an approach that indicates significant weaknesses and/or unacceptable quality. The Proposal fails to meet the stated criteria and/or lacks essential information and is

conflicting and/or unproductive. There is no reasonable likelihood of success; weaknesses are so major and/or extensive that a major revision to the Proposal would be necessary.

Ratings for each requirement must be recorded in the associated Rating column, and a detailed explanation of why a particular rating was given to a requirement must be recorded in the associated Comments/Justification for Rating column. The Appendix B Section column identifies relevant sections of Appendix B (Operations and Management Proposal Instructions) to the Instructions to Proposers.

| Requirement No. | Appendix B Section | Requirement | Rating | Comments/Justification for Rating |
|---|---|---|---|---|
| 1. | B8.2(A) | The Proposer shall provide a Customer Service Plan that describes in detail the Proposer's approach to providing the customer service functions described in the Contract, including the customer service services described in Schedule 3.7 (Operator Customer Service Responsibilities) of the Commuter Rail Operating Agreement. Elements of the Customer Service Plan shall include, but not be limited to, proposed approaches to the following:<br><br>1. Providing prompt and accurate public information regarding schedules, routes, delays and other service disruptions, and all other aspects of Commuter Rail Services about which customers should be informed;<br><br>2. Lost and found services; | **Good** | **Most notable is proposer outline to restructure the Customer Service Dept and specifically adding the position of Performance Manager and 2 Performance Analysts. This new position while reporting to the Director of Customer Service will be shared between Transportation and Customer Service. This position and reporting lines systemically changes the traditional dynamic of train crews being directly responsible and reporting to Transportation Managers. As the Performance Mgr also serves as the Quality Assurance Rep for Customer Svc & Transportation they will now have ownership of the Customer Service portion of employees connected to Cus Svc. For example the Director Cus. Svc through the Performance Mgr will own the part of conductors and asst. cdrs dealing with their; uniforms, announcements, fare collection, interaction with the customers etc. This change** |

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| Requirement No. | Appendix B Section | Requirement | Rating | Comments/Justification for Rating |
|---|---|---|---|---|
| | | 3. Planning for, and handling of, service related to special events;<br><br>4. Responding promptly and effectively to customer complaints and suggestions for service improvements;<br><br>5. Service monitoring;<br><br>6. Performance analysis and reporting;<br><br>7. Integrating new technologies and work practices as introduced by the Operator or the MBTA;<br><br>8. Provide information management, material management, performance analysis and reporting;<br><br>9. All other aspects of communication with customers; and<br><br>10. A draft Customer Service Satisfaction Plan as further described in Section 2.13 (Customer Service Satisfaction Efforts) of Schedule 3.7 (Operator Customer Service Responsibilities) to the Operating Agreement. | | **has the potential to have a significant impact on the traditional perception of the job of Cdr or Ast. Cdr.**<br>**The proposer's plan for managing the complaint process is greatly enhanced by having a "single contact person in each department..." to handle or assist with issues related to their dept. This consistency will expedite responses that are factually correct. It will also enhance internal resolution of the complaint/concern. The proposer will also monitor and evaluate the responses by those responsible for them and these evaluations will be part of the employees Annual Review. To further support the Customer Service Plan the proposer will: Staff an Operator Service Center 7 days a week from 6:30 AM to 8:00PM.-Hold monthly On-line Forums-Produce a monthly customer newsletter-Establish an interactive program for ADA customers with railroad employees called, Riding a Mile in Their Shoes. This program has the potential to greatly enhance the understanding and compliance of ADA regs. And more importantly the relationship(s) between customer and employee. Operation Deep Clean is a program to demonstrate to the customer Keolis commitment to clean trains. Customer service will also take part ownership of the inspection** |

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|---|---|---|---|---|
| | | | | **of stations once a week (7.A.1 pg 7-23) to ensure cleanliness.** |
| 2. | B8.2(B) | The Proposer shall: (i) identify those portions of the information that it provided in response to Section B8.2(A)(1) – (10) of Appendix B that it considers to be innovative, best practice, beneficial to MBTA Customers and/or cost efficient, and (ii) submit information supporting or otherwise validating its position that said portions are innovative, best practice, beneficial to MBTA Customers and/or cost efficient. | **Good** | **The proposer has indentified those portions of information provided in response to Sec B8.2(A)(1)-(10) in a clear concise table and provided supporting /validating information by example, statistics and/or case study. For example, Riding a Mile in Their Shoes, is explained in a case study on page 7-43 of the proposal.** |

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