

TO: Barbara Laursen, MTC

FROM: Lauren Isaac, 511 Rideshare Project Manager

RE: 511 Rideshare Customer Touch Points

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The 511 Rideshare team connects with Bay Area commuters to encourage them to carpool or vanpool. Our outreach goals have been twofold: 1. Build awareness around carpooling and vanpooling and 2. Incentivize people to change their commute mode to carpooling or vanpooling. Traditionally, the team has targeted commuters via their employers; however, there has been some marketing directly to individuals. Examples of the program's communication channels include the following:

- 511 Rideshare website
- E-mails to people who have expressed interest in carpooling or vanpooling (via events and/or website registrations)
- Employer and community events
- Commuter Services Department (CSD) placement (outbound) calls
- Employer consultations and lunch 'n learns
- Employer surveys
- Commuter Benefits Program communications
- Vanpool inbound and outbound calls
- Social media

This memo provides an overview of these approaches and it also provides a summary of all pilots and initiatives the 511 Rideshare team has undertaken during Fiscal Year 14/15.

Outreach Overview

Our team believes that personal and direct connections have the highest likelihood of changing people's behaviors. For that reason, making placement calls is a great tool because of the one-on-one connection our team makes with commuters. On the other hand, social media may not provide the personal connection, but it is a cost-effective way to reach a large number of people. The following table provides a summary of the 511 Regional Rideshare Program's customer touch points, a description of their intent, and their pros and cons.

Customer Touchpoints	Intent	Pros	Cons
Placement Calls	Follow-up with interested carpoolers and encourage behavior change	One-on-one communication, so messaging can be targeted and very effective	Costly to reach a large amount of commuters; operators may reach live person less than 50% of the time
Events	Educate companies' employees about ride	Can be one-on-one communication and reaches commuters	Can be less cost-effective than placement calls if

	sharing and available tools	who share a destination and could carpool with each other	events have low attendance or require significant travel or time; however the likelihood of speaking directly with commuters is greatly increased.
Emails to Customers	Remind interested carpoolers/vanpoolers about rideshare tools, benefits, and promotions	Very inexpensive approach to reach a large amount of people	Emails can only go to those that have expressed interest in carpooling (i.e. registered in the RMS), so other avenues are needed to obtain new email addresses
Emails to Employers	Remind employer contacts to email their employees about rideshare tools, benefits, and promotions	Very inexpensive approach to reach a large amount of people who may not have known about the 511 Rideshare services	Employer contacts may or may not forward these emails to their employees.
Social Media	Make people in targeted demographic aware of ridesharing tools, benefits, and promotions.	Very inexpensive approach to reach a large amount of people	People may or may not notice or respond to a ridesharing advertisement
511 Rideshare Website	Tool available to anyone with information on ridesharing tools, benefits, and promotions	Inexpensive warehouse of ridesharing information and matching – can easily be accessed	People need to know the site is available to actually go there.
Employer Surveys	Tool for evaluating a company's employees' travel behavior that includes an RMS link at the end.	The survey can be distributed to all employees at a company site, so the RMS link is shared with many people.	Access is limited to employers that are interested in the survey. Also, these can be costly due to employer services outreach required to encourage employers to conduct survey
Vanpool Support Calls	Inbound and outbound calls to connect with vanpool drivers and riders regarding meeting legal	Vanpool drivers and riders get help through direct communications from 511 staff	Costly to provide one-on-one service

	requirements and keeping the van full		
Commuter Benefits Program Communications	Phone calls, emails, and mailers educate Bay Area employers about this legal requirement; indirectly makes them aware of 511 Rideshare	Legal requirement has engaged a new set of employers that are now in the 511 Rideshare employer database	Employers are focused on legal requirement and not necessarily interested in promoting ridesharing.

The following sections provide a description of the various pilots and initiatives undertaken by various departments within the 511 Rideshare team.

Vanpool Initiatives

In the last year, the 511 Rideshare Vanpool Team developed two pilot programs intended to test new approaches to attracting new vanpool drivers and riders. These are both described below:

1. Selfie Promotion: We asked vanpool drivers to take a “selfie” of the vanpool group and send 511 Rideshare the photo so that it could be shared on our social media outlets. We did not receive any photos. Our team believes this is due to the vanpools running on very strict schedules and they would not take the time to wait and gather for a selfie.
2. Refer-a-Friend Program: In exchange for \$25 in Peet’s gift cards we asked existing vanpool drivers and riders to refer a friend. We received 53 submissions; however, we were only able to place one person in an existing van. Amongst the other referred “friends:” 41 “friends” did not respond, seven “friends” were already vanpooling, and four “friends” were already carpooling.

We are planning on continuing the refer-a-friend promotion in FY 15/16; however, as opposed to a solely online registration, we will provide vanpools that have available seats with Refer-a-Friend registrations cards that instruct the potential rider to contact us and tell us who referred them to a vanpool.

Recruiting vanpool riders and, even more so, vanpool drivers, can be extremely challenging; however, we believe the most effective approach is to pass all vanpool leads on to the vanpool vendors (Enterprise and vRide) because they have significantly more marketing resources to create new vanpools. Starting in FY 15/16, our team has focused our resources on maintaining existing vanpools. We do this by offering placement calls, seat subsidies, and other incentives. Moreover, in FY 15/16, we are piloting a newly designed Refer-a-Friend program, a new vanpool-awareness program called Classic Vans which will feature vanpools that have been in service for 10 or more years, and rewarding our vanpool coordinators who are responsible for providing us the needed paperwork/information to provide services.

Events Initiatives

In the last year, the 511 Rideshare team developed a new events strategy. The goal of this strategy was to participate in employer events where the team has the opportunity to maximize the possibility of changing people's commuting habits. The following are the key changes from prior years:

- Utilize event selection criteria to determine if the resources needed to participate in the event is justified. Examples include minimum event attendance, high engagement in past events, and employer participation with 511.
- Improved table lay-out, with both "self-service" materials and a greater focus on ridesharing (as opposed to general travel information).
- Customer Service Representatives (CSRs) staffing events in order to make a direct connection between the customers when they register at an outreach event, as well as when they follow up with a placement call.
- Pilot programs that tested new approaches for motivating table visitors to sign-up and activate their ride match accounts (see more below)
- Qualify registrants to make sure they are interested in ridesharing and/or the trip diary so we are no longer incentivizing completing registration forms.

In an effort to provide efficient event outreach, 511 Rideshare conducted two event pilots with the following outcomes:

1. Event outreach language that creates a sense of urgency around registration ("register today to win") works better than simply mentioning a chance to win something ("register and start tracking trips for tickets").
2. On average, about 20% of people who go through the on-site paper registration process at events verify their registrations. While our sample size was much smaller during the event pilot, we found that a fraction of that number, about 3%, were motivated to go back to their desks and register.
3. On-site iPad registration pilot project was reported to be poorly received, though inconclusive.

We plan to try a new approach with our signage geared to share "what's in it for me" to individuals. (Poster = "Ask us how ridesharing saves money, time and improves the quality of life.") We are pairing this with business cards with similar messaging that can be handed out to customers who don't want to register right then. The card (which includes a promo code) directs customers to register online or to call 511 Rideshare.

See Appendix A for a summary of lessons learned regarding events.

Commuter Services Initiatives

In the last year, the Commuter Services Department (CSD) has undertaken many changes and conducted numerous pilots based on the project's new direction to focus entirely on changing commute behavior to ridesharing. To begin, the CSD made significant updates to the placement call sources, priorities and approaches:

- The team began conducting placement calls after three days instead of 30 days because the team felt an earlier placement call is a better time to contact the customer, offer assistance and to confirm their interest in ridesharing.
- The CSD stopped contacting customers who don't have matching preferences on. They also stopped contacting non-registered (NR) records from the 30 day report because if they are still NR records after one contact attempt, the team believes they are less qualified (interested) than the active records.
- The team phased out the 60 day report because the team has had little success contacting or assisting those records with ridematching.
- The CSD has targeted their calls towards people who have logged into the RMS in recent months since these customers are more likely qualified (interested).
- The team screens the "Additional Information" report for customers who indicate they are looking for ridesharing options and makes placement calls to them.
- The team runs a matchlist prior to each placement call in order to provide compelling, customized messaging for customers about the potential matches they have.
- The CSD tries to get customers to log into the RMS to view their Matchlist (rather than sending it to them) and getting them use the RMS to contact their matches.

Other changes the CSD made in the past year includes the following:

- The CSD proactively sends out more matchlists than in the past by sending all active customers matchlists, rather than just ones they've spoken with, in order to maximize the chances that a customer will consider ridesharing.
- The team has created matchlist best practices (see Appendix B) that describe how to get the best quality matches from the RMS. This approach is both shared with customers and used internally.
- In March 2015, the CSD added the following question to our CSD Customer Satisfaction Survey "Did 511 help you find or maintain a carpool, vanpool or bike buddy?" To date 65% of those who answered have said "Yes".

A few examples of pilots the team is currently undertaken include the following:

- The team has been rewarding customers with "Commuter Champion Packets" for ridesharing or making efforts towards ridesharing. The packet includes a hand-written thank you note and a 511 bag mailed directly to the customer's home.
- The team is exploring a "Cars with Available Seats" pilot. These are targeted placement calls to people currently carpooling who may have additional seats available in their vehicles.
- The team is exploring a Current Commute Mode pilot, focusing on customers with Carpooling / New Commute / Drive Alone as their current commute mode because we feel these are more likely to be interested in ridesharing.
- The team has been focusing on updating the Initial Commute Mode to Current Commute Mode whenever we speak to customers. Early indications show that this approach, combined with the new customer communication strategy, have increased the percentage of customers who are ridesharing, however it's too early to draw any solid conclusions.

Employer Services Initiatives

In the last year, the 511 Rideshare Employer Services Team developed two pilot programs intended to test new approaches to attracting new commuters to employers' skin sites. These are both described below:

1. Employer Transportation Coordinator (ETC) Promotion Pilot: This pilot was implemented to determine if incentivizing ETCs would motivate them to promote our campaigns and lead to more of their employees logging trips in the 511 trip diary. After four months (two separate promotions), the team found there was no increase in trip logging when compared to the same time period last year.
2. 511 Customized Site Pilot: The objective of this pilot was to determine if registration through 511 RMS customized sites could be increased through more frequent and customized email communication to employees through their employer. Emails blasts were provided monthly to employers that agreed to participate in the pilot from January through July 2015. These emails promoted the 511 RMS and have customized hyperlinks for each employer's customized site. Participating employers agreed to send these emails to employees each month during the pilot. There were five employers that participated in the pilot. Results are still being compiled, but initial review has indicated a small increase in registrations from the targeted employees through both their employer's customized RMS site and the main 511 RMS site.

Conclusion

In summary, the Rideshare team tested many new outreach strategies during FY 14/15. Some were more effective than others; however, all were considered extremely valuable for informing future marketing initiatives. During FY 15/16, the team will continue the outreach activities that proved to be more effective while also testing new approaches via marketing direct to consumers.

Appendix A - Events Lessons Learned

Purpose: The purpose of this document was to capture the collective lessons learned from our many team members who have participated in employer and community events.

Pre-Event Coordination/Planning

- Works well when deciding whether or not to participate in an event:
 - Have a mutual goal with strong probability to achieve it
 - Identify historical outcomes from attending the event or like kind events.
- Good questions to ask the ETC/event organizer:
 - What's the pre-event publicity activity?
 - How many people are expected?
 - What's the motivation for attendance?
 - Will there be food, music and/or prizes?
 - How will vendors be located and will I have an opportunity to choose a location?
 - Will there be a requirement for employees to stop at every table as in a stamp card for a drawing?
 - Employers have been moving towards minimal paper distribution at events to be more eco conscious, ask about their campus goals.
- Considerations for the event strategy:
 - Where is the company located and what transportation options are best for the employees?
 - Is public transit readily available?
 - What corridor(s) do their employees drive?
 - Is carpool parking provided?

Event Day

- Best practices in generating traffic at table:
 - Enthusiasm, food, games, prizes
 - Eye contact with potential candidate
 - Smiling and waving candidate(s) to come over
 - Posters and collateral that have relevant information
 - Table placement is important although you may not have a say in this, along a busy route is better than a quiet corner
- Best practices in changing behavior:
 - Communicating the benefits of the service concisely with a take away that has a call to action.
 - Ask how they currently get to work/school
 - What do they want to change about their current commute to make it better
 - Making sure the user understands *what's in it for them* and that it can be delivered
 - \$
 - Time
 - Quality of life
 - If the commuter has objections ask if they can do it just one day a week. This often opens their mind to at least trying it out.

- If the commuter says it won't work for them, ask why they say that. Possible scenarios include: My schedule is erratic. Perhaps you can set one day a week and rideshare then, coming in early and staying late on other day. You may be able to find a partner that is willing to decide on a day to day basis if carpooling will work. If they drop off and pick up their children, they could start their carpool in the area where they drop off and pick up their children. I have had some individuals tell me that they have backup carpools for days they have to work late. Coming in with one carpool and going home with another.

Post-Event Activities

- Gather feedback regarding desired outcomes achieved and what they are. If they are not, why?
- Document considerations for future years' consideration, including feedback from employer

Appendix B - 511 RMS - Matchlist Best Practices

Purpose: The purpose of the 511 RMS Matchlist Best Practices SOP is to provide 511 RMS users with an optimized Matchlist that fits their personal needs and/or referrals to other ridesharing services when appropriate.

Follow these guidelines to get the best matches:

- Confirm Member, Employer and Commuter information (origin, destination and matching criteria) data is accurate and meets the customer's personalized needs.
- Run Matchlists using the following progression:
 - Radius-based using default settings (O4/D2)
 - Route-based using default settings (Mid/2)
 - Route-based using Mid/5
 - Radius-based using O6/D4
 - Route-based using Mid/8
 - Radius-based using O10/D10
- When matches are found, review the map; check the balloons and confirm criteria to determine the best potential matches.
 - Whenever possible, have the customer login and review the matches and map with you.
 - Admins should only email matches to customers when they refuse to login and view their Matchlist; you do not speak with them (and it's ok to send a Matchlist); or they request you send them a Matchlist.
- Whenever possible, have the customer use the "Email Matchlist" functionality to contact their desired matches
 - Customers should use this functionality once they have the proper Matchlist criteria established/saved; have selected which matches they want to email and have entered an email message to be sent.
 - Advise the customer that following up their email with a phone call is the best way to find and establish a ridesharing partner.
- If no matches are found when using the Matchlist progression above:
 - Explore adjusting matching criteria, if possible:
 - Changing Carpool, Vanpool and/or Bike Buddy Matching from No to Yes.
 - Changing Match Preference from My Company Only to Everyone
 - Can their Schedule be changed?
 - Can their Flex Time be changed?
 - Explore nearby landmarks and alternate origin or destination options
- If there are still no matches:
 - Use the Matching WITHOUT Matches (No Matches) script:
 - Advise the customer new people register every day and they will be notified by email when new users match their commute information.
 - Confirm that the "email matches" checkbox is selected.
 - Provide other ridesharing options and information:
 - Talk to co-workers, roommates and neighbors.
 - Try casual carpooling.
 - Try dynamic ridesharing and other ridesharing services.

- Provide a Transit Trip Planner option.
- Send them a 511 RideMatch Service Matchlist (No Matches) email, if appropriate.

Things to look for and/or think about:

- Customers using the “Email Matches” functionality to contact their matches (and following up with phone calls) is one of the best things customers can do to find ridesharing alternatives to driving alone!!!
- Quality is more important than quantity, narrow matching criteria, if appropriate.
- There are nuances to consider when applying Matchlist Best Practices when speaking to customers, leaving voicemails and/or sending emails.
- Remember that the Matchlist experience is different for the customer than it is for administrators.
- Always think about how the matches meet the customers personalized needs.
- Put yourself in the customer’s place, would this Matchlist work for you?
- Matching criteria are inter-related so it’s important to review the possible combinations and offer suggestions for improving matching options.
- Always review the Start / End points on the map to confirm they are correct.
- Whenever possible, have the customer login and review the matches and map with you because:
 - Getting them to email their matches from the RMS is what we want.
 - The Admin-sent Matchlist email doesn’t currently include a map.
- Advise the customer that following up their Would you like to share a ride? email with a phone call is the best way to find and establish ridesharing partners.
- It’s ok to tell a customer we don’t have any “quality matches” for them and to follow the no matches steps. Remember quality is our priority, not quantity.
- Remember the differences between account updates vs Matchlist searching:
 - Matchlist searching is temporary and allows you to try different matching criteria.
 - Account updates are permanent until changed and should be updated accordingly.
 - Only account updates are used for the “email matches” checkbox.
 - Only Home and Work are used for the “email matches” checkbox, not alternate origin or destinations.