

Shaping Rail's Future: Customer Community

Report: June 2023

Workshop: focus on stations
Customer service and the role of staff

Shaping Rail's Future: the customer community



- ✓ Hear about rail users' – and potential users' – experiences, impressions and opinions of the railway in Britain
- ✓ Understand strengths and weaknesses, where improvements are needed
- ✓ Involve rail users in potential solutions and new ideas to help shape the future of rail

40

Participants with a mix of:

- Reasons for using rail, and frequency
- Rail dependency
- Disabilities and not, and other needs e.g. travelling with buggies
- Demographics, lifestyles, attitudes
- Regions and urban, rural or suburban context



Each month, participants complete activities and answer questions around a particular topic

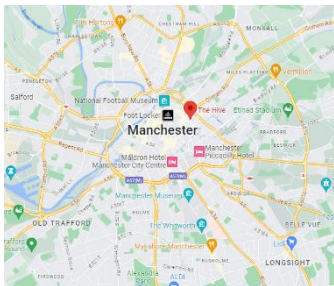
Via short videos, text, images

Individually, interacting with a moderator, and/or with each other

In addition, two face to face workshops to discuss topics further, generate ideas, and feed back on proposed concepts and solutions



12 months
from February 2023



Saturday 17th June 2023
Central Manchester

Full day workshop

with nearly all of the community,
joined by GBRTT and Transport
Focus colleagues



Deep focus on customer experiences at stations:

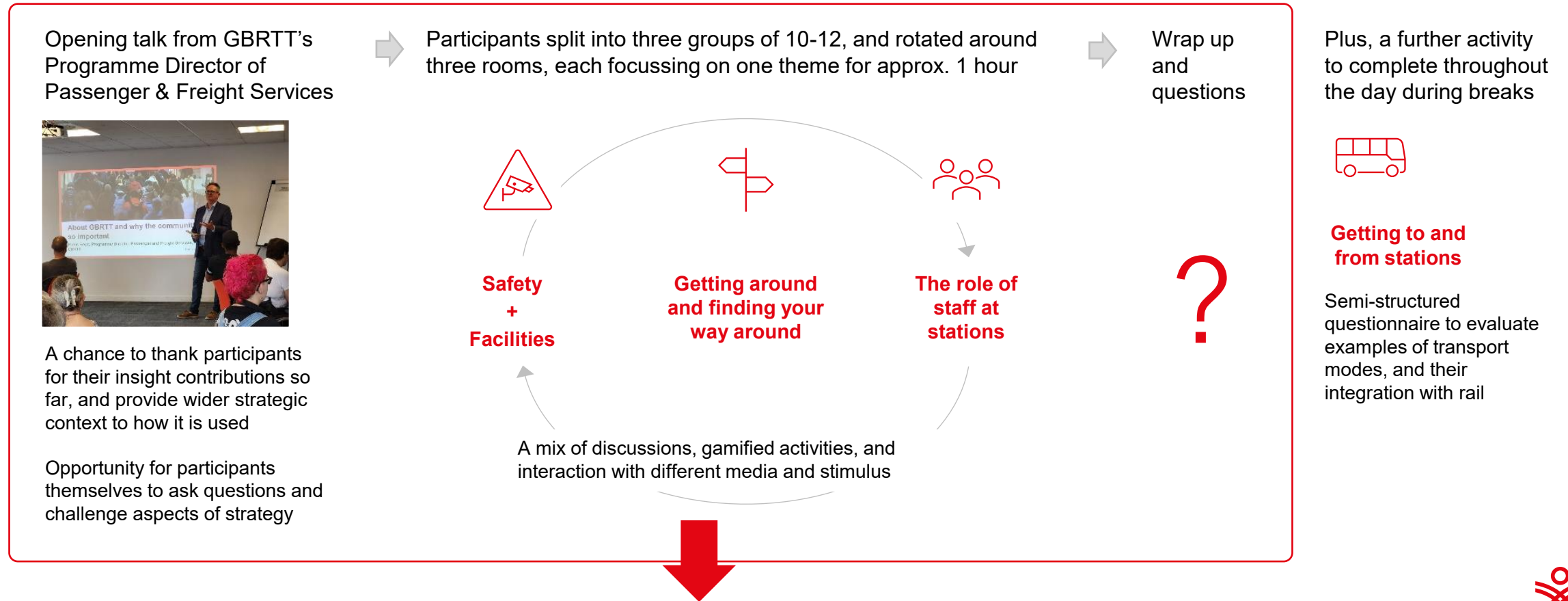
- Safety
- Facilities
- Getting and finding your way around
- The role of staff
(Onward travel)

Second workshop to take place in
November 2023, focussing on
customers' on-board experience

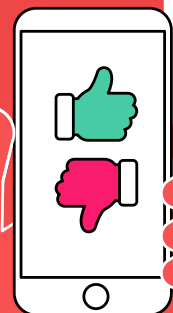


The workshop: a chance to engage face to face with the community, and hear richer discussion around customer needs to complement their online feedback

....and they worked hard!



This report looks at what participants told us about **the role of staff at stations**



A brief recap on the community's feedback about:

Customer service on the railway in general

Activities via the online research platform: March '23



The community's experience of customer service on the railway in general

Participants described 70+ examples of railway customer service they had experienced, highlighting that **the scenarios in which this is needed span all types of journey and customer context:**



Everyday queries & assistance needs



During service disruption



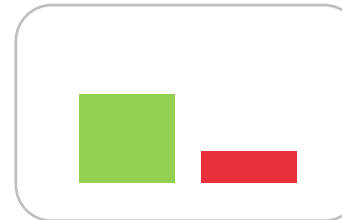
At other times

...and for both those making trips which are familiar to them, and those on unfamiliar journeys

Their feedback highlighted that **the rail industry is usually fairly good at providing “everyday” customer service, but** – while there are pockets of excellence – **it’s less consistent during disruption**



“Everyday” info / assistance needs



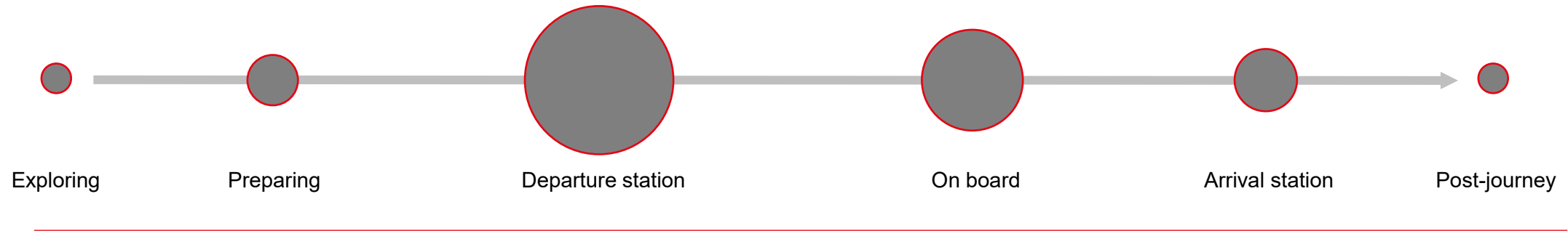
Customer service during disruption



The community's examples of customer service clearly showed that...

...it's most critical at stations:

Bubble sizes are a qualitative indication of the relative importance of customer service (regardless of how well it was delivered), from passengers' perspective, at key journey stages.



...front-line staff, seen as the face of the industry, received much **positive feedback**

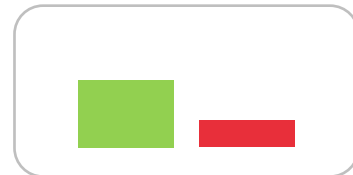
Though overall delivery of service is mixed at stations in particular – where help can be more needed, but where staff are sometimes perceived to lack the time, knowledge or sense of responsibility to be effective



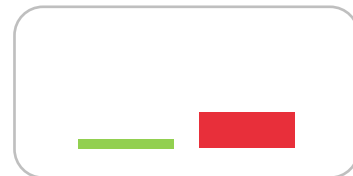
Station staff



On board staff



Phone / remote



While many individual station staff are friendly and engage well with customers, the major issue for customers is the presence of station staff, or lack of

Other key practical ways for station customer service to be optimised:

- Greater pro-activity from, and / or broadening responsibility of **ticket gate staff** in particular
- Clearly signposted, open / staffed **ticket offices**
- **Appearance of staff, and the way they come across** as readily available to help

Their feedback also helped to identify key principles to be consciously embedded in three central ways, in order to provide good customer service:



Structural / systematic

How things are set up within the industry to facilitate customer interaction

- ✓ **Consistency** across and within TOCs – so customers know what to expect, from whom, where to go
- ✓ **Staff given space and agency** to be empathetic, pro-active and effective
- ✓ **Ensuring customers know what customer service and information resources are available** – to avoid being passed around or wasting time looking for information, and to avoid a feeling of being left in the dark about service status



Practical considerations for staff roles & responsibilities

What staff do

- ✓ **More visible, easy to find and access, face to face staff**
 - As often as possible, especially at stations, but important on board too
 - Ticket offices & gate staff as a minimum, plus info/help desks and roamers
 - Clear, customer-service appropriate uniforms
- ✓ **Widened responsibility of any customer-facing staff**, especially ticket gates staff, dispatchers, on-board catering staff (all staff are “game”)
- ✓ **Ensuring staff have knowledge to be able to help** (via training, live comms channels when on site, tools like tablets, etc.):
 - With everyday queries
 -and strong, clear contingency plans for customer service during disruption
 - ...and in relation to other TOCs and even onward transport
- ✓ **Clear, customer-relevant, pro-active information** via written channels, announcements, individual staff interactions



Attitudinal

How they do it

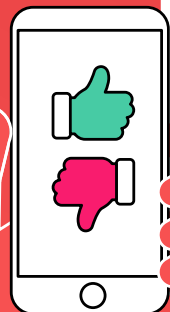
- ✓ **Open, approachable** (consider body language and positioning around stations, as well as personal attitudes)
- ✓ (Actively) **empathetic**, patient
- ✓ **Pro-active**
- ✓ **Pleasant** / friendly / personable
- ✓ **Straightforward**, efficient, no quibbles
- ✓ **Honest**, transparent

...and these principles need to be extended across remote customer touchpoints, as well as for front line staff



The workshop built on this
with a focus on:

Staff roles at stations



Understanding the customer perspective on staff roles at stations: overview of approach

Workshop activities and discussion



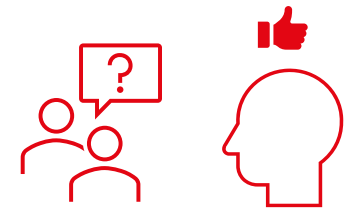
Group discussion on the support needs that customers have while at stations, in overview



Detailed mini group discussions on exactly where staff are deployed

Using case study examples at Category A | C | E stations

Gamified with figurines to represent roles / individuals, placed on station floor plans



Role play and group discussion on required attributes for station staff

Including discussion around recruitment and management

The workshop discussions added more detail to the customer perspective on staff responsibilities and functions at stations



Naturally, rail users focus on the ways in which they want staff to interact with them

Specific, individual assistance and support

- Assistance with ticket buying including with navigating TVMs
- Wayfinding / directions to correct platforms, exits, facilities
- As a back up or clarifier of visual, audio and online or other information (where customers distrust it, find inconsistencies, find it difficult to understand, or where electronic signs are out of order, etc.)
- Assistance with changes to journeys (e.g. as a result of disruption)
- Assistance with luggage / bulky items / personal mobility
- Other localised features of stations

Broader customer care

- Managing the movement of people / crowding
- A human presence to make customers feel safe*



Especially (but not limited to) during disruption

Overall, even if they don't always need to interact personally, participants strongly felt that a **visible staff presence** is crucial “**just in case**” of a **need**, however big or small

* Visible staff presence was felt to be the most important and impactful way to manage safety at stations, both in practice and in perception. See more in a separate report on safety at stations



And less on the “behind the scenes” requirements, like despatch, gate control, cleaning.

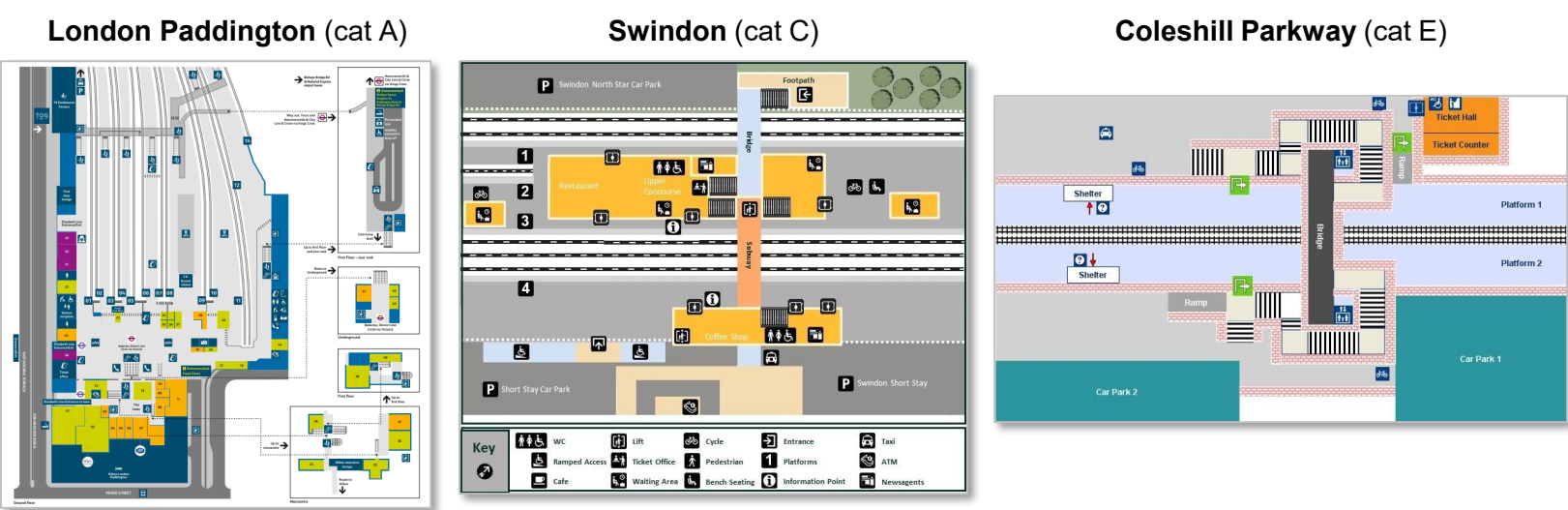
Customers do acknowledge the importance of these functions when they are drawn attention to (and they can be interested to hear about them) – but these are less front of mind, and less overtly critical to the customer experience from their perspective.

If the industry is keen to take a customer-first approach to rail delivery overall, then **there may be a need for a strategic culture change in some places**, to move the planning and management of station staffing away from that of a mainly logistical and operational safety model, towards one with a much greater emphasis on customer service (as well).

Separately, is there a place for educating passengers about some of the work staff do behind the scenes (providing this is presented carefully so as to never come across as defensive or as an excuse for limited staff availability)?

The recurring theme – staff being present “just in case” and as a back-up in context of risk in the railway service generally – really highlights the fact that many make train journeys with some anxiety (as well as reinforcing the importance of doing better in other areas of rail operation). Therefore **a key role for staff, and one which should be a guiding principle in how and where staff are deployed, and how they come across, is a simple reassurance: a counterpoint to potential anxiousness in customers.**

Discussions around three case-study stations highlighted key areas where customers expect and would like to see staff at stations



Arriving / leaving the station

Using / moving around the station

Boarding / alighting trains

(All) entrances / exits	Transport interchanges	Car park / bike storage areas	Thorough-fares	Ticket offices	Concourse / TVM area / waiting area	Dedicated info desks	Gates	Platforms
	(Entrances to / from, and / or within these areas)		(connecting different parts of station, e.g. bridges, subways)		(roaming)			

Larger stations: expectation that individual or teams of staff will cover each of these areas at all times*

Smaller stations: expectation for staff to move around these areas, and/or to be contactable and for customers to be “seen” here

* When train services are running or are usually expected to be running

Priority areas for station staff:

Case study | London Paddington

Key priorities for staff placement

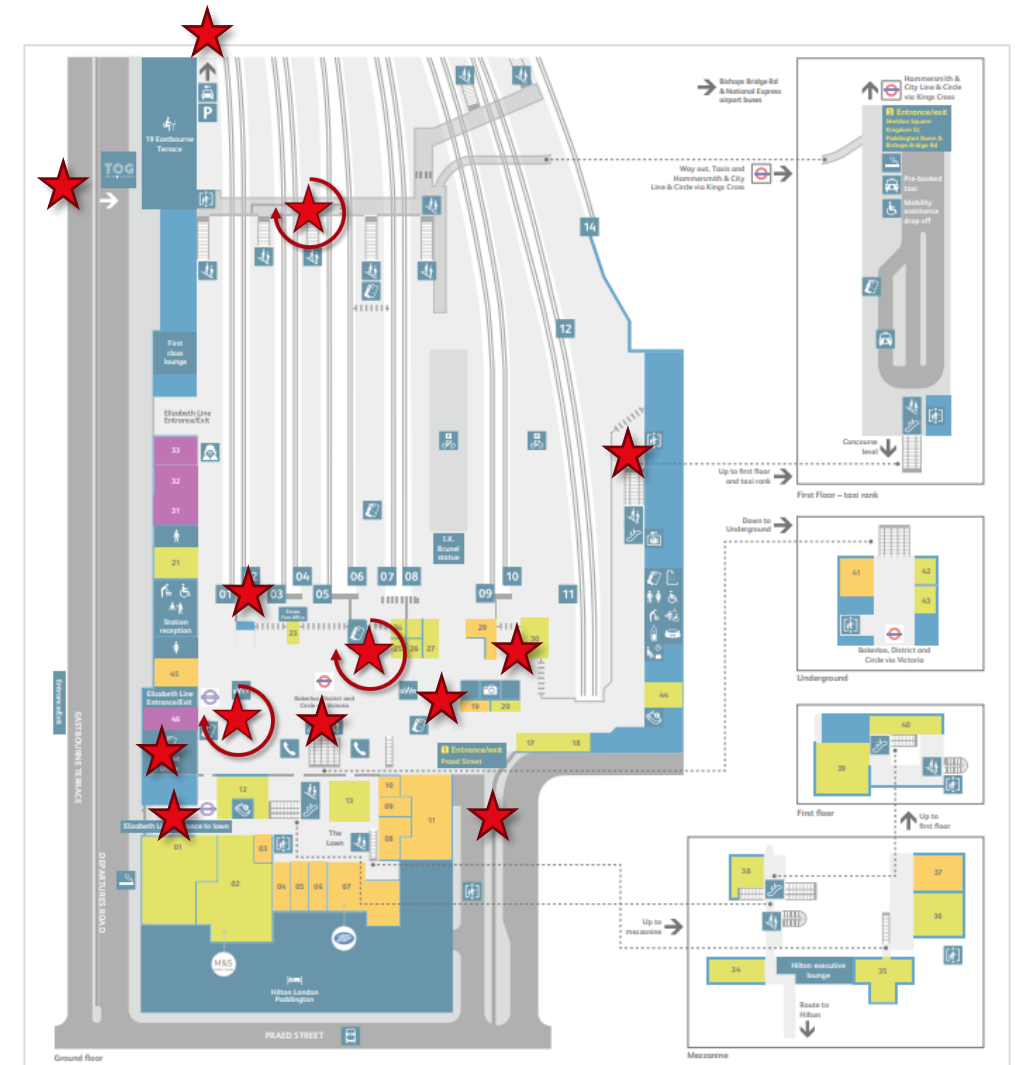
- Entrances / exits
- Areas for interchange with other transport modes (all entrances / exits)
- Ticket offices

At desks and roaming nearby: to capture straightforward queries and ticket sales, taking pressure off ticket queues (but not replacing desk staff in a station like this)

- TVM area (roaming, for similar reasons as at offices)
- Information desk
- Concourse inc. near platforms on concourse side (roaming)
- Barriers / gates
- Bridge (full length including stairs and entrance / exits)

Relatively less (but not un)important:

- On platforms themselves
This differs from smaller stations, where people more consistently feel customer-facing staff are needed on platforms: Perhaps due to higher expectation that platform personnel might be the only staff encountered at smaller stations, and because proportionately less time is spent on the concourse than at Paddington, where platforms are accessed only shortly before departure.
- For arriving passengers who are exiting the station



Plus: For large stations like Paddington (but also relevant elsewhere), participants also felt **that (structured) flexibility in staffing placement is important, to enable appropriate reaction to a variety of situations.**

This should be planned ahead – like football teams using different formations or set-piece movements in response to or anticipation of different scenarios.

- ★ Staff situated in this area (primarily static)
- ★ Staff roaming in this area

Priority areas for station staff:

Case study | Swindon

Key priorities for staff placement

- Entrances / exits

Including North Star Car Park side and bridge area: for security and wayfinding (or, if genuinely impractical, mitigating tools like cameras and help buttons – see more feedback on how to mitigate for limited staffing on the following page)

- Areas for interchange with other transport modes (all entrances / exits, and within the area, e.g. overseeing security of car park and cycle racks)

- Ticket offices

- TVM area

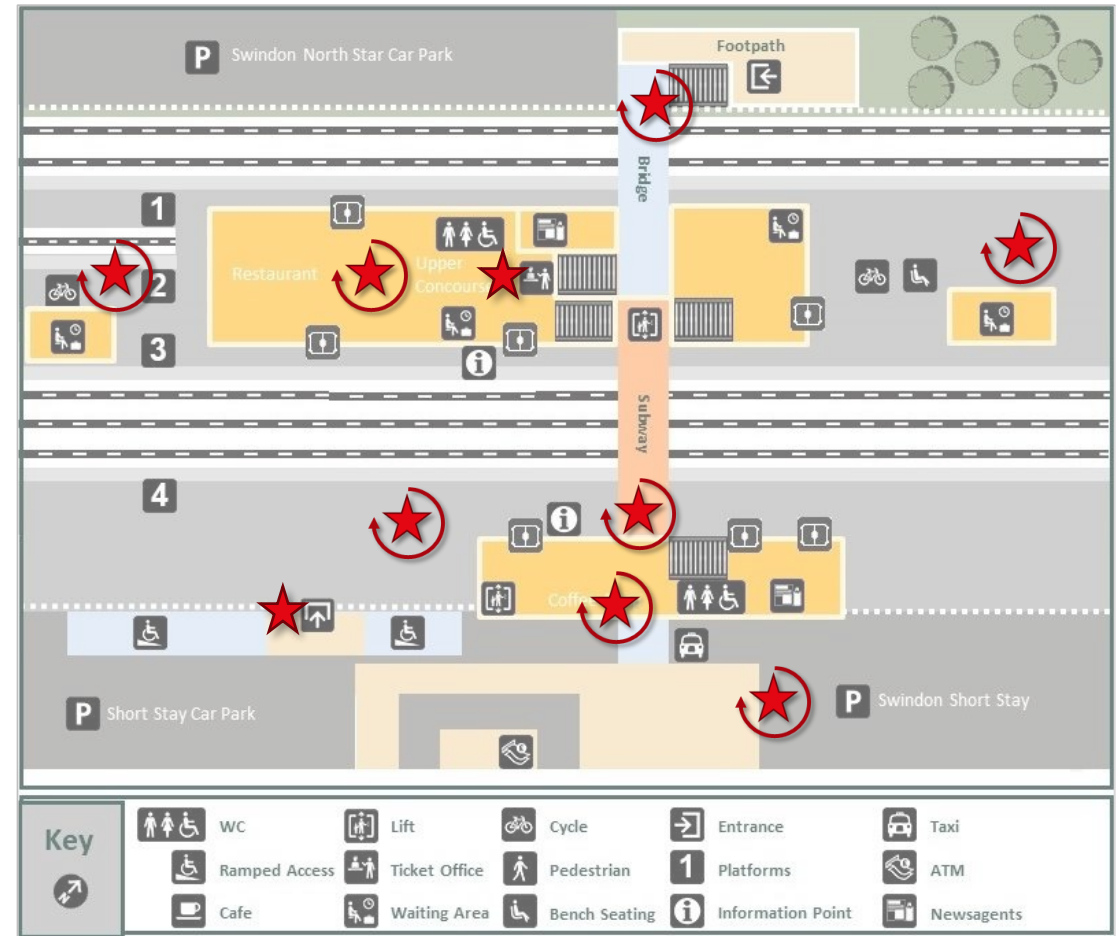
Roaming: able to help with ticket queries, with purchasing, and even to sell tickets like on-board inspectors

*Plus, expansion of this onto platform 4 side**

- On concourse and subway on both sides (roaming): for security, mobility / luggage assistance, general queries

- Platforms

Including both sides of bridge, and ideally with multiple staff across 1/2/3 given likely higher footfall and several different uses of the space here (e.g. waiting and general queries, ticket purchase, cycle storage security)

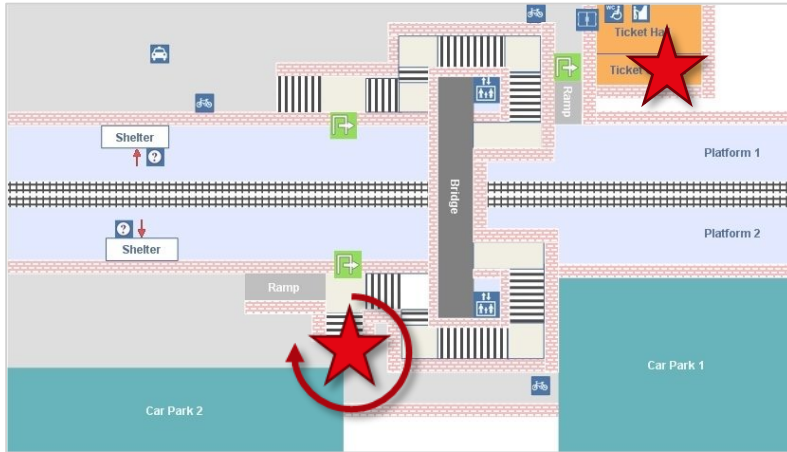


★ Staff situated in this area (primarily static)

★ Staff roaming in this area

* See more in a separate report on facilities at stations: in particular, participants queried the requirement on customers to cross the bridge to buy tickets, when many incoming passengers – especially those with reduced mobility, given step-free access – would be enter from the other side

Priority areas for station staff: Case study | **Coleshill Parkway**



Key priorities for staff placement

For participants, ideally, **a minimum of 2 members of staff** would be needed at a station like this, to cover **entrances, facilities use and platforms on each side of the bridge**:

- **Ticket hall area is assumed to be staffed** for ticket retail / queries at a minimum, and feels an **intuitive place to look** for staff if needed
- **Car park side** is assumed to have high footfall and is many customers' entry point, so **it feels counter-intuitive to be required to cross the bridge for assistance** if the train needed is on this side, or to feel left alone here

★ Staff situated in this area (primarily static)

★ Staff roaming in this area

This case study facilitated broader discussion around stations with limited or no staff

The idea that some stations are minimally or un-staffed was **shocking to many participants**.

They understood the rationale when it was explained – but such justification is rarely possible or appropriate in the moment of usage, and individuals can still need either emotional or practical assistance / reassurance



Customers have a very strong preference for staff presence wherever possible

Where it's genuinely less practical to have multiple staff, **it's important for customers to see and feel that the station – and the different areas within it – remains “connected”**, not left alone. In this case:

Tools / equipment to mitigate for staff presence

- **Cameras** (with video feedback to confirm working) on the car park side so that staff at least have eyes on
- **Visible, easy to access help points / call buttons** throughout the station, but especially on the unstaffed side, with staff reachable by buzzer / pager that they have on them at all times

Lateral thinking about how to provide human assistance; for example, participants advocated:

- **Roving customer service teams** across the area, and/or **managed as a satellite** to a larger nearby station – pro-actively monitoring the smaller station(s) via CCTV and regular in person visits, as well as contactable via help points or phone, or booked in advance. Key here is that customer service, even if partly remote, is delivered by people with knowledge of the individual station, and the routes served
- Investigating the potential for **station management / staff to work with local bus companies (for example)**, to enable bus drivers to assist with some queries, e.g. for train times, platforms, wayfinding.

Staff activities in each station location will depend on individual layouts, usage, localities, and other factors, but there are some overall customer priorities

	Entrances / exits	Transport interchanges	Car park / bike storage	Thorough-fares	Ticket offices	Concourse / TVM / waiting area (roaming)	Dedicated info desks	Gates	Platforms
Welcome / acknowledgement	✓	✓		✓		✓		✓	✓
Directions / wayfinding	✓	✓		✓		✓	✓	✓	✓
Ticket purchase / queries					✓	✓	✓		
Assistance: train services	✓	✓		✓	✓	✓	✓	✓	✓
Assistance: in / onward transport	✓	✓		✓	✓	✓	✓		
Mobility / luggage / special assistance	✓	✓		✓	✓	✓	✓	✓	✓
Security / safety <i>Personal / property / risk from other people*</i>	✓	✓	✓	✓		✓		✓	✓

...and in general, while there might be primary functions relevant to some locations, there is an **expectation that staff in all areas will be able to provide a range of different customer service needs**

This feedback is collated from workshop sessions on staff at stations specifically, as well as other sessions on facilities, safety, and getting around

** See more in a separate report on safety at stations*

■ Essential function

✓ Other assumed ability

Some further important themes in the management and deployment of staff at stations

Staff need to be...

Accessible to customers

Visible, approachable, easy to reach

(or as a minimum, in some limited scenarios, known to be present, e.g. via audio or other channels)

Connected

Meaning the immediate local area, and interconnecting routes that customers might also be using

Broad, not narrow in terms of role, responsibility & knowledge

Facilitating staff to have the ability, agency and flexibility to do what the customer needs, not what a system allows

Participants also felt that this is important for staff morale and so, in turn, performance

Customer focussed

In terms of both:

- *The functions they perform, rather than logistical priorities (as we have seen)*
- *The way they perform them*

In practice, in some places, this may mean additional staff are needed to cover all the functions of value to customers, in addition to operational responsibilities which cannot be reduced

In order to be effective for customers, staff at stations must be **accessible**

This community, representative of rail users across the UK, could not stress enough **the importance of a visible, front-line staff presence at stations**, to effectively meet what they saw as the core needs around:

Safety – operationally, and for softer reassurance | Individual assistance | Broader management of how customers move around the station

In practice, the staffing model at each station needs to be tailored to individual factors including local area, typical usage, seasonality – but there are some universal implications:

For all stations

- **More roaming staff** – approachable, pro-active, dedicated to customer assistance rather than logistical operations
- **Staffed throughout hours of usual operation** (inc. in case of delays / disruption)
- **Salient, easy to find, easy to reach staff**
 - **People do gravitate to certain natural areas** where they expect to find staff or other assistance, e.g. dedicated information desks, ticket halls
 - Remote help points also need to be in a standard, expected area at a minimum, as well as **saliently located in several other places** around the station
 - **Clearly recognisable staff** (and help buttons): uniform, lanyards, vests, signage
- **Approachable staff** – station operators need to be really mindful to avoid a “them and us” perception, with considerations for:
 - **Body language and how staff are grouped** (customers can find it awkward to approach “huddles” of staff)
 - The **presence of any kind of physical or virtual barrier** (staff being behind gates, behind a desk, etc.)

...and a recap for small, sparsely or un-staffed stations

Views are mixed on whether limited staffing is acceptable – but even for those who accept justifications, **getting this and any mitigation right is a priority** for customers, and overall they feel strongly that **improvement here is needed**:

- **It is worth reviewing staff presence**, and reconsidering whether introducing more staff might be beneficial on some stations – where it can make a demonstrable positive impact, this is likely to be seen by customers as a good investment
- But where fundamentally impractical, **mitigation for low staffing is an area ripe for innovation**, even seeking solutions that might work better for customers
- Popular ideas (albeit with some caveats) include:
 - Staffing models that work across localised networks of stations, including roving, responsive staff teams covering multiple or satellite stations
 - Always-on help points – made more visible and in greater numbers across stations (not just for emergencies)
 - These have relevance both for unstaffed stations, and those with limited staff – to continue to facilitate customer service during mandatory breaks for example

In order to be effective for customers, staff at stations must be **connected**

At smaller stations:

Staff and customers to have close contact with others (relatively) nearby

(As we have seen), for stations with limited or no staff, participants suggested and liked the idea of **centralised customer service to cover a limited network of stations**, potentially with facility to be mobile and respond on site

(Early feedback on **remote service via TVM screens is largely positive**)



- ✓ Speak to a real person including visually
- ✓ Efficient, compared to looking for information on your own
- ✓ Frees up other on-site staff for other needs
- ✓ Potential for help with a range of queries
- ✓ TVMs are felt to be a particular area of friction for some

Reachable

Facilities like call buttons / help points, and **staff having pager-style or tablet devices*** were very popular with participants - to ensure staff are contactable regardless of where they are at a station

**suggestion that these should be clearly branded to indicate to customers that these are being used legitimately*

Informed

Customers feel that **it shouldn't be unreasonable to expect that on-site staff have the best and most up to date information about services** – rather than customers needing to find out from (what are sometimes found to be conflicting or misleading) online sources for example

“ When staff at stations don't have the information you need – maybe because of disruption – it's as bad as not having any staff at the station in the first place ”

In order to be effective for customers, staff at stations **should hold a broad set of responsibilities, rather than narrowly defined functions**

“All staff are game”

In their individual feedback given via the research platform earlier in the year, it was clear that the community expected that any staff they encountered on a station (or on board) should be able to help with any issue relating to their train (or end-to-end) journey:

It's not for the customer to find the right member of staff for a particular TOC, or a particular issue they have

This theme arose again strongly in the workshop

And fits well with the popular notion of “roaming” staff at stations who might interact with any number of different customer needs in different locations



This has implications for management, training, and tools / equipment, including:

Rotating specific tasks throughout a shift

For staff benefits including:

- ✓ Motivation and interest (customers have a perception, even prior to recent industrial action, that railway workers feel under-appreciated and sometimes lack motivation – especially on gatelines)
- ✓ Better overall understanding customer needs via exposure to different types of customer interaction, at different points around a station

Requirement for **a range of competencies / attributes in recruitment**, rather than a focus on a narrow set of skills or experience

High priorities being:

- ✓ Empathetic
- ✓ Problem-solving, pragmatic, adaptability
- ✓ Self-motivated, ability to take initiative



And more generally, inclusion of **softer people skills as a fundamental requirement** for any staff likely to be in customer contact, even if not a primary part of their role

High priorities being:

- ✓ (Sufficiently) outgoing / willing to engage
- ✓ Articulate in communication
- ✓ Listener, patience
- ✓ Optimistic
- ✓ Resilience
- ✓ Awareness / openness to diversity in all forms

Training and information beyond an individual operator

Expectation for staff to have mobile / tablet devices for access to information across operators, to be able to help customers

In order to be effective, staff at stations **must take a customer-focussed mindset in the way they come across and interact with customers**

The workshop sessions involved some role-play examples of typical customer-staff interactions, to stimulate discussion about how staff come across. This reinforced feedback given by participants earlier in the year*; with key principles for both staff themselves and how they are managed. In summary:

For staff

In all cases: everyday queries and issues, regardless of whether or not something has gone wrong

- **Show willingness** – engage fully with customers, look available to be approached, be pro-active
- Show **empathy** and genuinely **treat customers as individuals**
- **Maintain enthusiasm** (e.g. customers are likely to be encountering an issue for the first time, regardless of how many customers a member of staff may have helped with the same issue)

Where something has gone wrong

- Accept **accountability**: genuine apology
- Take **ownership**: seek to amend a problem for a customer, in a practical way. Requires staff to have some flexibility in their role, and therefore to have training and knowledge beyond a narrow, defined remit
- **Be resilient and remain professional**: customers understand that disruption can make things difficult for staff, and they acknowledge that sometimes members of the public can be unreasonable, even aggressive. However, ultimately, they do see it as staff's responsibility – and indeed purpose – to deal with these situations constructively

For management

Regardless of context, it is the perception of many rail users that station staff do not (consistently) receive a great deal of training or support in how to interact with customers, in order to deliver service in these ways.

While there are of course individual staff members who do it well, this is often seen as being down to chance and personality rather than management practices.

In order that staff can do this effectively, customers suggest that they need to be:

- (consistently, always) **recruited with customer-facing attributes in mind** (see previous page)
- given the **space (time) within their role and activities** to engage meaningfully within individuals
- **given appropriate emotional / personal support**, e.g. opportunity to collect and reset, after dealing with difficult customers or stressful situations
- encouraged to **keep customers – and best practice in customer service – front of mind** all of the time. For instance, via regular team meetings to share and discuss certain situations and interactions, and how to deal with them

Seek to facilitate individual customers' journeys (within reasonable parameters of train timetables and safety requirements), rather than to facilitate the logistical movement of trains and people →

- **Be pro-active** – as appropriate: anticipate needs, offer help, or be available
- **Reduce customer effort**, e.g.:
 - In case of train cancellation, issue refunds immediately at station, or start claim process off on customer's behalf
 - In case of disruption or a problem related to a different operator: liaise directly with relevant colleagues from the other operator on behalf of the customer, rather than simply directing customer to a different person

Summary

Feedback from the community had previously indicated that, **within an end to end train journey, customer service needs are important through all journey stages, but can be most important and impactful at the station** (especially at the departure station). It also highlighted the **central role of front-line staff within this**.

The workshop built on this initial feedback around customer service on the railway more generally, with a specific focus on the role of front line staff at stations.

While station staff members' responsibilities for safety and logistical operations are clearly of paramount importance, **customers really value whether and how staff interact with them, in three priority areas:**

- Individual assistance for specific issues and queries
- Broader management of people flow and crowding
- Safety and security

And across all of these areas, **a key role for staff is simply being there for reassurance: a counterpoint to potential anxiousness** that many customers have, regardless of experience or familiarity, when travelling by train.

If the rail industry is committed to taking a customer-first approach to rail delivery overall, this critical role for staff has implications for their numbers and presence, their recruitment, training, what is required of them both functionally and attitudinally (and therefore how they are supported and appraised), and how, when and where they are deployed.

Customers want to see and (have the opportunity to) interact with staff:

- **Across all areas of the station, at all stations:** in particular this means more roaming staff, better coverage of more remote parts of stations, and at very small stations where consistent staff presence is impractical or financially unviable, it's important that other measures are used to help the station and its users feel connected to the rest of the network
- **Without effort:** staff (including virtually / remotely) must be really salient, easy to reach, and approachable. All staff with any customer contact must also have the ability to help customers in a practical way, regardless of their named job title or specific employer – potentially requiring broader training, and access to a wider base of information
- **Who are customer-focussed** – prioritising empathy for individuals and a willingness to help, having been given the time, support, training, tools and information necessary

About Transport Focus

Transport Focus is the independent consumer organisation representing the interests of:



Bus, coach and tram users across England outside London.



Rail passengers in Great Britain.



All users of England's motorways and major 'A' roads (the Strategic Road Network).

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www.transportfocus.org.uk

Transport Focus is the operating name of the Passengers' Council

We work to make a difference for all transport users.