



## Agenda Item 4b

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TO: Clipper® Executive Board

DATE: May 29, 2018

FR: Carol Kuester

RE: Next-Generation Clipper® (C2) Customer Service Center Procurement

This memorandum is to update Board members on key developments in the C2 Customer Service Center (CSC) procurement. The CSC procurement is one of four procurements currently planned for the C2 system, which also includes procurements for the System Integrator, Fare Media, and a Payment Gateway.

### Background

In collaboration with a group of transit operator representatives and MTC staff, the C2 technical advisor IBI has developed a general Scope of Work (SOW) for the C2 CSC contractor. The SOW includes the following:

1. Operations to support the following communications channels: phone, email, social media, chat, mail, and fax
2. Other work activities:
  - a. Participation in C2 System Integrator design
  - b. Provision of Interactive Voice Response (IVR) system
  - c. Eligibility verification for Youth & Senior Fare Categories
  - d. Provision of tiered levels of customer service for private and institutional partners
  - e. Option to provide a Walk-in Center

In fall 2016, MTC staff reported to this Board about the potential opportunity to contract for a shared customer service center for both the Clipper and FasTrak programs. From 2016 to early 2018, MTC staff and technical consultants for both Clipper and FasTrak investigated the potential for a shared customer service center. Staff found that a shared customer service center might provide operational benefits and user experience benefits, but cost savings would likely be marginal. Moreover, the timelines for the Clipper and FasTrak customer service center procurements did not align. However, to allow the region to reevaluate aligning customer service activities for the two programs at a future time, staff recommends a contract term for the C2 CSC of five years, with options to extend, which will align the Clipper® and FasTrak CSC contract terms, permitting reassessment of a shared CSC at that time.

### Next Steps

MTC staff anticipates finalization of the C2 CSC technical requirements this summer. From July through September, MTC, with input from transit operator staff, will finalize the RFP with the expectation of issuing the RFP in October 2018.

Over the summer, MTC and transit operator staff and will work to resolve outstanding issues related to the CSC contract, such as key performance indicators, performance incentives and disincentives, and contract payment mechanism.

We will continue to provide the Clipper® Executive Board with updates on key developments in the C2 CSC procurement process.



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Carol Kuester

**Attachments:**

- Attachment A: C2 CSC Procurement Update

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# C2 CSC Procurement Update

*Sara Barz*

Clipper Executive Board  
June 4, 2018

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Attachment A

# C2 Procurements

System Integrator  
Customer Service Center  
Fare Media  
Payment Gateway



# C2 Procurements

System Integrator

Customer Service Center

Fare Media

Payment Gateway



# C2 Customer Service Center Scope

1. Operations Contract for Contact Center
2. Special Features
  1. Participant during System Integrator Design
  2. Interactive Voice Response (IVR) system
  3. Eligibility Verification for Youth & Senior Fare Categories
  4. Tiered Levels of Customer Service
  5. Option to provide a Walk-in Center



# No Shared Contract for FasTrak & Clipper

1. Individual C2 CSC Contract in 2018
2. Shorter contract term (~5 years) with opportunities for extension
3. Integration hooks / support for pilot opportunities in future
4. Collaboration with FasTrak CSC Procurement team to ensure reciprocity



# C2 CSC Procurement Timeline





# C2 CSC Procurement Timeline



# Next Steps – Resolve Outstanding Items

1. Contract Duration
2. Contract Payment Mechanism
3. Service Levels / KPIs
4. Minimum Qualifications
5. Evaluation Criteria

