Sales Distribution and Customer Service

November 12, 2015
Agenda

• FY15 Accomplishments and FY16 Plans
  ▪ Contact Centers
  ▪ eCommerce
  ▪ Sales and Reservation Systems
• Project EPIC
Amtrak has been continually driving to lower-cost channels

Trends in Share of Sales by Sales Channel

<table>
<thead>
<tr>
<th>Share of Sales</th>
<th>FY05</th>
<th>FY06</th>
<th>FY07</th>
<th>FY08</th>
<th>FY09</th>
<th>FY10</th>
<th>FY11</th>
<th>FY12</th>
<th>FY13</th>
<th>FY14</th>
<th>FY15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self Service</td>
<td>44%</td>
<td>49%</td>
<td>53%</td>
<td>58%</td>
<td>59%</td>
<td>61%</td>
<td>64%</td>
<td>68%</td>
<td>70%</td>
<td>73%</td>
<td>75%</td>
</tr>
<tr>
<td>Contact Center</td>
<td>27%</td>
<td>25%</td>
<td>22%</td>
<td>19%</td>
<td>19%</td>
<td>18%</td>
<td>16%</td>
<td>15%</td>
<td>14%</td>
<td>14%</td>
<td>14%</td>
</tr>
<tr>
<td>Station Agents</td>
<td>10%</td>
<td>10%</td>
<td>10%</td>
<td>9%</td>
<td>9%</td>
<td>8%</td>
<td>7%</td>
<td>6%</td>
<td>7%</td>
<td>8%</td>
<td>7%</td>
</tr>
<tr>
<td>Travel Agency</td>
<td>19%</td>
<td>17%</td>
<td>16%</td>
<td>14%</td>
<td>14%</td>
<td>13%</td>
<td>11%</td>
<td>10%</td>
<td>9%</td>
<td>8%</td>
<td>7%</td>
</tr>
</tbody>
</table>

*“Self Service” includes Amtrak.com, Quik-Trak, Mobile App, Julie, and Travel Agent Web.*
Contact Centers continue to contribute a significant share of revenue

- Revenue contribution from the contact centers has been stable over the past 4 years
ASA, Particularly for CRD, Has Steadily Improved

- The ASA at the Customer Relations desk has fallen 50% from 593 in FY14 to 295 seconds in FY15
Customer Sat is Strong

<table>
<thead>
<tr>
<th>Survey Question</th>
<th>FY14</th>
<th>FY15</th>
</tr>
</thead>
<tbody>
<tr>
<td>How satisfied are you with the overall experience calling Amtrak?</td>
<td>4.3</td>
<td>4.4</td>
</tr>
<tr>
<td>How satisfied are you with the overall experience with our reservation agent?</td>
<td>4.5</td>
<td>4.5</td>
</tr>
<tr>
<td>How satisfied are you with the information you received from our reservation agent?</td>
<td>4.5</td>
<td>4.5</td>
</tr>
<tr>
<td>How satisfied are you with the <em>knowledge</em> and professionalism exhibited by our reservation agent?</td>
<td>4.5</td>
<td>4.6</td>
</tr>
<tr>
<td>How satisfied are you with the amount of time it took to reach an Amtrak reservation agent?</td>
<td>4.1</td>
<td>4.2</td>
</tr>
</tbody>
</table>

1 = Very Dissatisfied, 2 = Dissatisfied, 3 = Neutral, 4 = Satisfied, 5 = Very Satisfied

The amount of time on hold continues to be our weakest area based on customer feedback, but still acceptable
Amtrak.com FY15 Accomplishments

• New Trip Planning functionality makes it easier for customers to understand their itinerary options
• Amtrak.com re-skin launched in June
• Created an ADA advisory board to provide feedback for future initiatives
• Added parking options for customers through a relationship with Parking Panda
Customer Mobile Applications

- 6.9M downloads by end of September ’15

- 7.3% of sales through Mobile App

- Responsible for approximately 50% of Train Status Requests

- Launched multi-ride sales through the mobile application

- We now see as much as 20% of multi-ride bookings coming through the mobile application

- Completed proof-of-concept that proved a single code solution can support booking functionality and deliver the desired customer experience. Migration is targeted for April/May 2016.
AmtrakConnect 3.0 Launched

- Mobile-based platform, automatically adjusts to all screen sizes
- Surfacing of content has been incorporated to increase engagement and dwell time
  - Average session has increased from 35 seconds to over 5 minutes
- Launched rev-share partnership with Zerve, promoting city-based “things to do”
- Now working on potential advertising rev-share program
## New Bike Service – ‘Walk On’ and ‘Walk up’/Checked

<table>
<thead>
<tr>
<th>Equipment</th>
<th>Inventory</th>
<th>Routes</th>
<th>Fare</th>
<th>Launched</th>
<th>Sales FY15</th>
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</thead>
<tbody>
<tr>
<td>F40/NPCU</td>
<td>12-15</td>
<td><strong>Heartland Flyer</strong></td>
<td>$0</td>
<td>Aug 24</td>
<td>18</td>
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<tr>
<td></td>
<td></td>
<td>Oklahoma City – Fort Worth</td>
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<tr>
<td>New Bag Cars</td>
<td>6</td>
<td><strong>Carolinian</strong> (pilot)</td>
<td>$0</td>
<td>Aug 3</td>
<td>54</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Charlotte – Raleigh</td>
<td></td>
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<tr>
<td></td>
<td>12</td>
<td><strong>NE Regional Special</strong></td>
<td>$25</td>
<td>Sep 15-30</td>
<td>39</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Service/UCI Bike Race</strong></td>
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<td></td>
<td></td>
<td>Philadelphia – Richmond</td>
<td></td>
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</tr>
<tr>
<td>Superliner Bag/Coach Car</td>
<td>7</td>
<td><strong>Capitol Limited</strong></td>
<td>$20</td>
<td>Sep 15</td>
<td>261</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Washington - Chicago</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>All station stops</td>
<td></td>
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<tr>
<td>Upcoming/FY16</td>
<td></td>
<td><strong>Palmetto</strong> (10/26)</td>
<td>$20</td>
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<td></td>
<td></td>
<td><strong>Silver Star/Silver Meteor</strong> (11/2)</td>
<td>$20</td>
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<td></td>
<td></td>
<td><strong>Crescent</strong> (11/9)</td>
<td>$20</td>
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<td></td>
<td></td>
<td><strong>Pere Marquette</strong> (Spring 2016)</td>
<td>TBD</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td><strong>Hiawatha</strong> (Spring 2016)</td>
<td>TBD</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>All LD Trains with New Bag Cars</td>
<td>$20</td>
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</tbody>
</table>
New Bike Service – ‘Walk On’ and ‘Walk up’/Checked

Superliner Bag/Coach Cars – Capitol Limited

New Baggage Cars

NPCU Interior
State Partner Hosting on Amtrak.com

• In 1Q15, we worked with the Commonwealth of Virginia to migrate the Amtrak Virginia site to Amtrak.com Hosted on Amtrak.com

• The benefits of this migration include:
  ▪ Top Search Engine Results Placement
  ▪ Tracking and Metrics
  ▪ Ask Julie Virtual Agent
  ▪ Foreign Language Sites
  ▪ Leverage national advertising spending since all advertising points to Amtrak.com
  ▪ Ask Julie Virtual Agent
  ▪ Consistency and most up-to-date (correct) information

• As a result, bookings and revenue generated during a session on the main landing page (versus referrals) went up 245% and 384% respectively when comparing FY14 and FY15 year-over-year data October through June.
New State Partner Templates

- San Joaquin JPA and Amtrak Virginia will be initial pilots

- Site-lets will consist of 8-10 pages of content and have individual navigation structure.

- Will leverage off Amtrak.com assets to provide: language translation, Google Maps, Ask Julie and website analytics
Pre-Trip Email

• In Jan/Feb we will launch the first pre-trip email for the following pilot routes:
  - Auto Train
  - Southwest Chief
  - All LD service with Chicago as departing destination

• Goal of this is to:
  ✓ Generate excitement for the customer’s upcoming trip
  ✓ Provide instructions to modify their itinerary using self-service
  ✓ Assist in the boarding process by providing ticketing instructions, boarding time, policies and relevant content
  ✓ Provide easy access to departure and arrival station information, maps and directions

• We plan to expand to other routes in the 3rd/4th quarters of FY16
eTicketing Expansion

• Print Anywhere for non-dedicated thruway services
  ▪ Launched in October ’15
  ▪ Rollout target completion end of CY15

• eLift support for VRE mobile app
  ▪ Conductors can scan VRE step up tickets

• Travel Document Customization
  ▪ Provides CCJPA contact information on the travel documents on Capitol Corridor journeys
  ▪ Dynamic route and station information in 2016

• Transportation Certificates Automation
  • Email delivery of Transportation Certificates and self service redemption through Amtrak.com
  • Scheduled launch December ’15
In February 2015 the Sales Distribution and Customer Service team launched the *Travel Distribution Platform (TDP)* project. TDP will unify Amtrak customer channels and agent interfaces while creating a user experience that increases customer satisfaction, embraces the modern travel experience and provides Amtrak’s agents with leading-edge technology for sales and ticketing functionality.

In April, we branded the TDP effort “Project EPIC”, an acronym that means: *Easy, Personal, Intuitive, Compelling* and defines the strategy we are using as we design and develop TDP.
Travel Distribution Platform – Enhancing the Amtrak Experience

The solution, once implemented, will enable Amtrak to recognize its future vision across all touch points

Amtrak.com
- Mobile optimized site
- Enhanced search and booking capabilities
- Tighter integration with loyalty program
- Increased revenue with Ancillary products
- Targeted & personalized content

Contact Centers
- Omni channel experience
- Better insight into the passenger
- Upsell opportunities
- Case management linked to customer profile

Station Agents
- Real time information
- Enhanced capabilities for fulfilling ancillary products
- Better tools to aid passengers
- Efficient service request handling

3rd Party Partners
- Standardized services across multiple vendors
- Enhanced security & compliance
- New products and services offering
Improving Each Step of the Customer Experience

Identified and developed the core use cases involved in establishing a complete customer journey, supported by improved business capabilities and data management processes.

Amtrak.com
Agent Interfaces
3rd Party Partners

SEARCH
BOOK
PAY & RESERVE
MODIFY or CANCEL

Supported by

Digital Marketing & Personalization
Account Management & Customer 360 Profile
Product Management & Fulfillment
Forms of Payment & Promotions
Case & Knowledge Management

Business Rules
The Project EPIC team completed the Discovery and Design phases in FY15 and has moved in Development. The team will continue soliciting Amtrak stakeholder and customer feedback on the platform designs.

### TDP Development Timeline

<table>
<thead>
<tr>
<th>2015</th>
<th>2016</th>
<th>2017</th>
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</thead>
<tbody>
<tr>
<td>FEB</td>
<td>JAN</td>
<td>JAN</td>
</tr>
<tr>
<td>MAR</td>
<td>FEB</td>
<td>FEB</td>
</tr>
<tr>
<td>APR</td>
<td>MAR</td>
<td>MAR</td>
</tr>
<tr>
<td>MAY</td>
<td>APR</td>
<td>APR</td>
</tr>
<tr>
<td>JUN</td>
<td>MAY</td>
<td>MAY</td>
</tr>
<tr>
<td>JUL</td>
<td>JUN</td>
<td>JUN</td>
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<td>DEC</td>
<td>NOV</td>
<td>NOV</td>
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</tbody>
</table>

**Agile Development:** The Project EPIC team is deploying an Agile development approach. TDP functionality will be frequently tested with users and feedback will be incorporated into incremental designs before finalization.
Our Approach To Project EPIC

The Project EPIC team collects input and feedback from our key stakeholders in order to inform the design and implementation of TDP.
Research Across The Country
From Discovery To Development

Discovery started with the baseline TEC questionnaire to identify detailed requirements to drive the implementation process.

**TEC Questionnaire**
- 160 Functional Requirements
- 100 Non-Functional Requirements

**Requirements Gathering**
- 780 Enhanced Functional Requirements
- 150 Enhanced Non-Functional Requirements
- 17 Net New

- 30 Epics
- 140 Themes
- XXX User Stories
- XXXX Tasks
# Phase 1 Accomplishments

Our team will build on the capabilities delivered after each phase; capabilities will continue to become more developed and advanced after each subsequent phase.

## What we Accomplished in Phase 1

- Omni-channel creative designs for core booking flow
- Set-up and configuration of 4 Enterprise Platforms
- Configured and coordinated development platform for 4 systems
- Implemented core reservation process between all systems
- Implemented core customer scenario and synchronization
- Built API architecture and communication protocol
The EPIC Team has been travelling to Amtrak stations around the country to spread the word, build momentum and gather real-world feedback that will be incorporated into the future Travel Distribution Platform.

**Roadshos by the Numbers**

- **76** Roadshow sessions conducted
- **538** Participants engaged in Roadshows
- **25** Locations visited
- **156** Participants signed-up for Project EPIC updates

**Usability Testing**

*PARTICIPANT OVERVIEW*

<table>
<thead>
<tr>
<th>Participants Tested</th>
<th>Mary Ann</th>
<th>Dan</th>
<th>Paul</th>
<th>Sandy</th>
<th>Non-Customer</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Chicago Participant</td>
<td>Los Angeles Participant</td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

**PARTICIPANT REACTIONS**

**Likes**
Overall, the visual appearance of the site received very good feedback. In addition, participants liked search results, the home page and the overall booking process.

**Dislikes**
Explicitly, users did not like the add-ons or Journey Lines (primarily in LA). Opportunities for improvement are more dense within the Trip Details (search results), Seat Accommodations and Traveler Information steps.

**Why Amtrak?**
- Comfort
- Convenience
- Productivity
- Better than the alternative (driving/traffic)
Project EPIC – TDP Delivery Schedule

- January 2016 – Oneway Trip, Account Management
- March 2016 – Round Trip, Case Management
- July 2016 – Group Travel, Multi-Rides, Cancellations
- August 2016 – Content / Campaign Management
- October 2016 – Passrider bookings, Quick-Booking, Hold Itinerary
- November 2016 - All development completed and UAT begins
- January 2017 – deployment begins to Contact Center, Stations, Amtrak.com
  - Complete deployment expected to take 3-4 months
  - New Kiosks as well as Mobile CSR devices will rollout concurrently
Questions?