

**Michelle Ockers** Hello, Simon Jobson. Welcome to Learning Uncut.

**Simon Jobson** Hi, Michelle. Good to be here.

**Michelle Ockers** And it's lovely to be crossing paths with you again. Of course, we did some great work at Qantas back in 2016, 17. Yeah. When you're working at Qantas and now you're at Sydney Trains.

**Simon Jobson** That's right. Yeah. Yeah. It seems that a while ago we did some really nice work. I remember you coming and doing some great work there. So, yeah, it's great to be here and keen to get into it.

**Michelle Ockers** I have a question for you. I've longed to ask someone this question. It's a movie reference, but I think entirely appropriate. So what's your preferred mode of travel, planes, trains or automobiles?

**Simon Jobson** I think it's a loaded question. It's a bit of a joke with friends of mine because I've worked for Qantas and now I'm at Sydney train. So planes, trains, obviously automobiles might be my next job, but it's too much of a loaded question. I have to say trains. I actually really enjoy trains. It doesn't matter which country. I always just like the way that you can just sort of move around if you're going long distance and also just sort of the freedom of being able to do whatever you want and wherever you're working on your computer or just looking out the window and daydreaming. I'm a trains guy and I'm not just saying that because I'm with Sydney Trains right now. I just think it's a beautiful way to travel, to be honest.

**Michelle Ockers** Yeah, do you have any specific train journey that's a favorite, either a specific one or a specific route that you like to take?

**Simon Jobson** You know, I have very fond memories of traveling from London to Paris in the Crosstown train many moons ago with my wife. And I just always remember that trip. We had a bottle of champagne out and a whole bunch of beautiful salami and cheeses. And it was a beautiful way to travel. So I'd almost say that was probably my favorite train experience. But, you know, there's plenty more that I'd like to do. I'm quite keen to actually do the Trans-Siberian at some stage. But there you have it.

**Michelle Ockers** Yeah, sounds great. I've done that channel crossing, although I was with my then teenage daughter. So there was no champagne.

**Simon Jobson** There was no champagne. I highly recommend the champagne route myself.

**Michelle Ockers** keep that in mind. I had a very memorable trip. When I left school, I joined the Air Force and I was, my hometown was Sydney and with the Air Force, I

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was up in Toowoomba in Queensland. So I did, for one of my home trips from Brisbane, I'd got the train from Brisbane to Sydney and it was an overnight trip. So I had a sleeper And I ended up sitting in the guards carriage, playing cards with the guards. And it was just this beautiful moment of connection on the trains.

**Simon Jobson** Yeah. Superb. Actually, you remind me, I traveled around India for about four months, many moons ago, and got around by trains that way as well. And in the sleepers. And that was a beautiful experience, too. I haven't thought of that for a long time. But, yeah, it's a good way to travel. Right.

**Michelle Ockers** Yeah, it is. We might have just boosted train travel, Simon.

**Simon Jobson** That's for sure, 100 percent.

**Michelle Ockers** Get on those trains. So, of course, Sydney Trains. Let's talk about Sydney Trains, who you work for. They don't do long distance train travel. Can you tell us just a little bit about the scope of what Sydney Trains does, where they do it?

**Simon Jobson** Yeah, of course. So I work for Sydney Trains. We work in the Greater Sydney region. We move about 1.1 million people a day. Before COVID, it was about 1.3. But of course, COVID devastated really, I think, the whole transport business in a sense, or many businesses, and people were slowly coming back. We're getting back to sort of full carriage now. You know, interestingly, you know, it's a way of sort of mirroring what the way people are working from home and the way they're living. Certainly our quieter days are still Monday and Friday where people prefer to work from home. But from the Sydney perspective, Wednesdays and Thursdays are our busiest days and getting back to full complement. We do obviously a large scale commuting. We have a lot of large-scale events. We've just recently done the Women's FIFA World Cup, which went very well. We have the Sydney World Pride Easter show, New Year's Eve fireworks. New Year's Eve is a huge, huge, huge night for us, for any people overseas who've ever come over and seen them. The Vivid Light show, So we have a continuous stream of large scale events we cater to, but essentially our stock standard is getting people to work and back again throughout the week and obviously weekends too. So it's a large scale operation. It's very complex. It's very operational, but it's a really great way to travel and a really great place to work.

**Michelle Ockers** Fantastic. And customer service, customer experience, it's the topic we're going to talk about today in a program called the Elevate program that you've developed and rolled out around customer service. You and I have just done some reminiscing where we've touched on a couple of, for you it was the champagne, for me it was playing cards with the guards. We touched on a couple of like memorable moments around customer experience traveling on trains. But of course, it's a different proposition when you're talking about urban train travel, much shorter trips. But what does good customer service look like for Sydney trains?

**Simon Jobson** Yeah, so customer service for us is articulated from our strategy down. We have in our overall strategy; customer at the centre and people at the

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heart. And part of that is really just thinking our focus in on our customers, being at the heart and the center of everything we do, particularly in our decision making, and then customer at the center. And so those people are our people who do that day-to-day interactive customer service. We have our customer service principles. They're six core key principles that we focused a lot of the Elevate program, which we'll be talking to you about, on things like, you know, first impressions count, communicate clearly, and a whole bunch of other areas. We look at really about how to be proactive in our customer service, trying to anticipate what our customers' needs are. A lot of it also is we're focusing in on not so much the technical knowledge, but more so about behavioural elements. The technical knowledge for our people is already there and knowing what to do. It's more about anticipating and anticipating what they need, but also their behaviors that they're eliciting when they're doing their one-to-one interactions with people. And part of what we've been focusing on is about what we call memorable moments and an unanticipated moment of delight, if you like, if you're looking at sort of Jan Carlsson way back in the 80s and all his philosophy. But really what's a memorable moment? And for me, part of the program that we're going to talk about is that, yeah, sure, people get on a train, then they get off a train, they have an interaction with one of our people, they may tell them to way find where to go on a destination that they're going to. And that's a nice interaction, that's a seven out of 10. But for us, it's actually, what's an extra string you can add to your bow that really, that unanticipated memorable moment that you can provide it from sort of being a seven out of 10 interaction It's been a 9 out of 10 interaction and what kind of extra little bit of extra quality do you need to add towards that interaction through your behavior for you to get there.

**Michelle Ockers** And I think also, you know, can we just put put a pin in that one for a moment? So what? how? Give us an example. Just build on that example you've given us the way finding example. Someone asked, how do I get on a particular train station? I want to go to this destination. How do I get there? What would you or what would you program help people see as a way to get from a seven to a nine for that interaction?

**Simon Jobson** So rather than saying, oh, OK, you're going to the airport. Just go to platform 22 and you can get on the train straightaway to go there. That's an opportunity, particularly if it's a person with their young family, they have a whole bunch of luggage that they need to get onto that platform. If you have that moment in time, say, okay, come with me, I'll show you, and you can lead them over, you can lead them to the escalators, maybe you can get in the escalators with them and go up to the top, and then actually say, hey, look, there's your train that's coming, it'll be arriving in six minutes, you should be able to get on the train, no problem. And then you might even say to them, actually, if you've got a minute next time you're traveling, you've used any of our really cool apps. Yeah. And then they might get out. They say, well, look, try this app here. Let me show you how to do it. And next time that you're traveling, this is the way that you can work your way through about actually finding what station you need to go to. So it's more actually making more of a fulsome experience for that person. Now, notwithstanding, the thing in Sydney trains, and it would be the same for every person listening across the world who work in this kind of industry, you can't do that with every interaction. Because there's literally hundreds of people that are coming through all the time that you need to

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help. But if you see a moment of opportunity, if you have the time and you can actually interact with that person and give them that 9 out of 10 experience, then we encourage you to do it. Not only is it a great experience for the customer, it's actually a nice experience for you as the person, as the customer service attendant as well. It puts a bit more of a spring in your step if you're being friendly and you're giving and receiving as well. So it's all part of that conundrum, I think, that improves the whole customer service experience for everyone.

**Michelle Ockers** Yeah, there's a lot of synergy in that, right? For the employee as well as the service provider, as well as the receiver.

**Simon Jobson** The other thing I'm always interested about is inconsistency. So, you know, I'm not really as interested in your first customer interaction of the day. You've had your coffee, you're fresh and bright-eyed and bushy-tailed, and you're on it. It's when you've got three minutes before the end of your roster. somebody comes up to you with a bit of a curly problem and you're hanging to get out there because you just want to go home. And what's the consistency of your interaction at that moment in time and how are you displaying that particularly through your behavior that you interact with that person? And I think that's a really core key kind of anchor for anyone is about what's your consistency as well. And these are other areas that we explore as well as your mindset and a whole bunch of other stuff.

**Michelle Ockers** Nice. So we've talked a bit about the experience you're trying to help create for customers as well as for your frontline staff. I believe you use a fair amount of business data and feedback to understand the customer service needs and then to build the Elevate program. Can you talk to us a little bit about how you leverage data and what kind of data you use as you started to look at shaping the program?

**Simon Jobson** Yeah, absolutely. Look, Sydney Trains, like a lot of organisations, once you start trying to dig as an L&D person, there's a whole raft of information that we can garner and utilise.

**Michelle Ockers** Rail operators are swimming in data, right?

**Simon Jobson** There is a bit of analysis paralysis, potentially, but I don't think it's just for Sydney Trains, to be honest. We have a whole way of monitoring a whole ton of customer feedback via social media. We gather a lot of data there. We have an interesting one called CXMP. This is a mystery shopper. Basically that's an external person who observes persons in stations. are actually out there on the station. They don't identify themselves. They might go up to a customer service attendant and ask them questions as if they're a pretend pseudo customer. So that's what we have a mystery shop and we gather data from there. They also look at things like cleanliness, customer sentiment, station cleanliness, train information. We also have our feedback 131500 number where people make phone calls. CSAT, Customer Satisfaction Surveys, which is done every six months, where people are randomly phone called, I believe, and if they've travelled on a train in the last three days, we gather data from there. So I think it's really important, you know, when you're coming

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up with an L&D program, you know, it shouldn't be designed organically, though sometimes you go in certain directions. It's actually about working out what's your ROI, What's your return of investment? How are you going to actually measure the program? For me, that helps solidify and focuses you a lot more on sometimes, if you're clear on your end objective about how you're going to measure that to the business. Also, you're not worth your salt when you're actually facilitating, when you're doing your pitch, if you like, to your executive directors about what you want to do. you have to show them the ROI, obviously. And I know I'm telling a lot of your listeners how to suck eggs in a sense, but really, we were really clear about that and about how we wanted to measure our results and how we performed. So that's a key element. And luckily at CityTrains, there's a lot of information that you can utilise. The trick is just trying to find it.

**Michelle Ockers** Yeah, starting business first is critical if you actually want to be able to make an impact and get real business outcomes. Let's talk about the program itself. And then there's some key aspects around how you went about developing the program. And so there's some really interesting things you built into the program. But let's start by briefly giving us an overview of the program. You've talked a bit about the audience already, but from a user standpoint in particular, for one of the participants, What is the whole experience look like and feel like for them?

**Simon Jobson** Yeah. That's a good question. Look, I mean, funnily enough, you know, I take a little bit of L&D inspiration from John Cleese. That's interesting.

**Michelle Ockers** I don't think I've ever, in five and a half years of podcasting, I don't think I've ever had someone say to me my inspiration was John Cleese.

**Simon Jobson** Tell us more. I've got a bit of time for Joe. Look, John Cleese, he can be a bit of an oddball and I don't think his behaviour in the BBC has been exemplary at all in a while. But love him or dislike him, whatever your taste for him is, he's a very intelligent guy. And interestingly, in the early 1970s, he kicked off a L&D company called Video Arts Limited. which actually is still running now, and they run a lot of their L&D on short films of high production values with big time celebrities. You know, way back when, when they had guys like, if you go on their site, you see Rick Mayo and Jennifer.

**Michelle Ockers** We'll actually pop a link to the site in the show notes. It'll be a bit of fun for people.

**Simon Jobson** They do L&D through humor, which I kind of like, but don't worry. You know, I don't think we're all meant to be comics and running around like clowns. We're doing L&D shows for sure. But here's a saying, people learn nothing when they're asleep and very little when they're bored. I like that as a real key moniker. I find a number of L&D programs tedious at times. I find them a little bit lazy at times. And what I mean by lazy is that deaf by PowerPoint. And somebody might think that, oh, you know, we'll make it interactive by giving somebody some reading material just before the training commences. And that's, you know, pat themselves on the back. And I think to do a good piece of work that's engaging You need obviously to



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think far more from a blended multimedia perspective. If you are going to be going face to face, you need to be thinking about, you know, physical environment and a whole bunch of other outside areas rather than actually just the content itself per se. So when we went to set up the program, there were a number of things that, you know, we had to align with. First of all, strategically aligned.

**Michelle Ockers** Can you pause for a moment? I just want to go back before we, like there's so much good stuff to talk about here about how you went about this. Just come back, circle back to the user experience and let's just kind of ground people in. If I'm a user, if I'm someone who's going to participate in this program, how do I hear about it? How do I enroll? What do I go through in the program?

**Simon Jobson** So we wanted to, first of all, First of all, look, I'll put it straight. I didn't want to do a face-to-face training program, Michelle, right?

**Michelle Ockers** As a designer, you didn't want to create a face-to-face training program?

**Simon Jobson** Not at all. I mean, I mean, if you think about, you know, the old classic, old Ebbinghaus learning curve, you know, you forget 90% after 30 days. The old event-based. Yeah, you forget, was it 50% after six hours? I mean, you know, that for me, for everyone who's designing, it's, what's the point? Seriously, what's the point? What's the point in face to face? I think we're all completely evolving away from that. So originally, our concepts of the team I was working with, you know, let's do space learning repetition. Let's get, you know, cohorts of 20 people out for two hours. Let's talk about, you know, scenario, highly contextualized based learning. for two hours where they can talk about relevant recent scenarios that have happened to them from a customer service perspective, then align it to the customer service principles, and then give a few actions, and then you scaffold it, and then everyone meets about five weeks, four weeks later, once they've applied some of that learning, then they extend it further, then you talk about memorable moments, blah, blah, blah, right? And so, you know, that's what we would like to do. But in L&D, sometimes you're stymied from what, you can only play with the cards you dealt. Because I remember meeting with workforce management, who are a wonderful team, and said, okay, so, you know, we want these people in line and we'd like it relevant. So, just these four or five stations, 20 people released, two hours, you know, blah, blah, blah. And they just look at you and like, okay. What planet are you from, Simon? And I'm thinking, who's taking the crazy cookies here? Is it me? Am I taking the crazy? Well, you're taking the crazy cookies. There's no way we can release people in a roster like that. You know, we can only release them at eight hours at a time or whatever, you know? We can't be, oh, well, how about half a day? Well, we can't do that either. Are you joking me? And it would close down half the line if we released 20 people from just three stations. And I'm like, blah, blah, blah, blah, blah. So eventually, you know, then you sort of go, well, can we do a large scale event where we can do some sort of golden thread, 120 people, this beautiful, and you know, they just look at me like I'm crazy. So if I'm, if, you know, I'm stymied and I'm cornered, and I've done my best to influence a number of times, but I'm hitting my head against a brick wall, you have to play with what's in front of you. And

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what was in front of me was I had to do that, the one day workshop. So if anyone's listening to this going, Why is he only doing what everybody knows you shouldn't be doing? We'd already thought through that. So what we needed to think through was how do we approach it for the learner to make it far more engaging? And we did it a number of ways. So I always call it the pre, during and post and think very carefully through that. And I really wanted to do a digital multimedia blended program. So the pre, we made really nice video animations. that was actually heavily contextualised. So it was human-centred design. We had about 25 workshops that utilised the spine of the organisation. We'd spoken to a whole bunch of loaded people of staff about what exactly they wanted and what were the hooks for them. And part of the hooks that we know at Sydney Trains is that it's a real Australian legacy family culture. And what I mean by that is not unusual. There are grandparents working with their grandchildren, their brothers and sisters, you know, many people met each other and got married and all these sort of things. It's quite a family centred organisation. So I wanted to start thinking about what's the marketing that we can do to actually promote this actual programme, because I think L&D marketing is a poor area that we don't often focus upon. Yeah, we get so focused on the content and make it an amazing day rather than thinking the pre. So we released with our comms, with our executive director coming out, talking, made this really nice piece talking about the historical legacy. And we know that you already do a fantastic job and we move all these people and really trying to give emotional hooks into people so that already that they were beginning to become interested. We also then did what are digital postcards. So a digital postcard is every person. So one week out before you attended the training, You've got a digital postcard in your email or via your mobile device, where you can click on it and you get a welcome. But more importantly, rather than getting a welcome from the executive director, which is fabulous and she's amazing, but you also get a welcome from an employee. And we did our best, it didn't always work like this, but one part of the employee who was local near you. And the purpose of that was just so to get your interest. So straight away, you're like, oh my gosh, there's Tania, it's in the video. first thing you're going to do is maybe text Tanya, say, oh my God, I just see you in the video. And to try and create some form of momentum and thinking and break down some sort of pre-perceived negative connotated expectations of what they were going into. Because I find a lot of people sometimes, say with customer service training, people feel I've been doing it for 15 years. I'm fantastic at customer service, so why do I even need to go to this? It's not just my organisation, it's everywhere else I've ever worked, and then sometimes these people turn up. And I say, I call them suckin' lemon. They sit at the back of the room. I don't know if any of you L&D people, some of you. I think this is going to sound familiar to anyone who's facilitated a program that people have been told to come on, right? You know, those two people who sit at the back and they sort of slouch a little bit and then they sort of cross their arms and they give the look, you know, when you facilitate and see them give each other, and they sort of, there might even be a wink or something at each other and you're like, oh, golly gosh. But so the purpose was even before they got into the room, they knew about Elevate. They'd already seen somebody relevant that they'd known about. They'd already been speaking about it. And of course, we'd already done some, we worked really nicely with the comms team with our releasing of information and comms about that. And that was really important too.

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**Michelle Ockers** You know, Simon, it strikes me that what you're doing here is you're honouring, you talked about the organisation being kind of this legacy organisation. You're trying to honour that legacy, honour and respect the time, the length of service that people have had, but find a way of opening them up and motivating them. and tapping into, and I'd be interested to know, you know, what were the key levers that came up out of that, the HCD workshops, you're talking about emotional hooks, you're trying to tapping in, tapping into something to motivate them to come along and be open to doing even better whilst honouring the contributions they've made and the legacy that they and their families have brought to the organisation. What's the balance there and what were some of those hooks?

**Simon Jobson** I think some that you looked at Yeah, look, some of the hooks for them is that, you know, they've already come from a rich and proud history of providing quality customer service. So, for me, it wasn't about whacking, you know, whacking them over the head saying, thou shall now need to do this.

**Michelle Ockers** Yeah.

**Simon Jobson** It was more about you have, we value your experience, we value your knowledge, we value your commitment. We want to then draw on that as a collective and share that from almost like a social learning construct to actually a lot of the experience of memorable moments. We'll give you some, but actually what are your memorable moments? When have you seen a fantastic experience? So you try and contextualise through a relevant scenario that is completely scenario driven from them on the frontline facing staff who did this. It was 1800 people who did that, who actually commenced with it. And also, you know, you play a role in somebody else's journey, and you help connect our customers' lives. And it's that kind of emotional pull we were thinking about. And I think it was another really important thing, I think, when you're doing large-scale blue-collar, is we're investing in you. Yeah.

**Michelle Ockers** And I think that's an important point that we haven't really dug into. A lot of these roles are what we would call blue collar. Is that still politically correct to call them blue collar? I don't know. I understand the term, but I don't know if there's a better term we're supposed to be using.

**Simon Jobson** I'm getting in trouble now. You've got me in trouble. But yeah, I mean, exactly. You know, those engagement surveys we always have, right? I always find them really interesting. Again, it doesn't matter where you work, Telstra, Nokia or wherever. you know, the people always seem to be negative about the way senior execs communicate with you. And the other one they always say is we don't get enough training. And I think it's really important to reposition that when you are providing that with them, is that we're actually really investing in you. And the other thing that was really important for me was it's about shifting the dial. So for everyone who went there, As we would speak about this in my team, you can't get 100% of people to suddenly change their behavior from a customer service perspective. But, you know, from a tipping point, you need 30, 35%. So if we can get 30, 35% of people who actually have a really powerful experience and actually do on a daily



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basis, just change one or two behaviors that they do from a customer service interaction, you're going to shift the dial.

**Michelle Ockers** Gosh, that can add up, right? It accumulates.

**Simon Jobson** Well, at 1,800 people, you do the math, right? And what we found is, and we'll talk about it, about how it went at the end.

**Michelle Ockers** Well, you have 1.1 million opportunities a day, potentially, right?

**Simon Jobson** Great line. Yeah, exactly. You know, customer service is all just about finding the opportunity, particularly when things like degraded mode, when things aren't going well. That's when you get your nines out of tens. The big thing we have is people losing their mobile phones. I mean, that's what, you know, anyone who's listening to this, as soon as, you know, people go to the bathroom with their blooming mobile phones these days. So, you know, when you lose it, you feel like you've lost your right arm and people are very upset when they, when they've left it on a train or whatever. And, and, you know, part of it, we do fantastic customer service and actually getting back those, those, those mobile devices for people. But, you know, that's amazing, because the person's in such a high level of anxiety. Once you provide great customer service and ring down the line and are able to maybe recoup that phone, their sense of relief, you're suddenly a 10 out of 10. And so it's those critical moments that you need to be acutely aware of about how you're performing and behaving and demonstrating empathy and all these other things at that moment of time.

**Michelle Ockers** OK, so we've got these people in the training room. We've covered the pre and we've got them in the training room. And of course, There's a mix of levels of motivation and interest. You've talked about, you know, maybe you've got a couple of people in there who've been there a long time and are kind of sitting there with their arms crossed. You would, of course, have others who are raring to go. So what's that experience like? Well, bring us back to that classroom day.

**Simon Jobson** Yeah, it's about, you know, it's about taking them on a journey. It's about making sure your sessions are not in isolation and that they scaffold and build on each other. I know everybody knows this, but it's good to reinforce that. So, you know, we always commence talking about our history, our people, our legacy. How long have you been working in the organization? You add up those years and then say, oh, golly gosh, you know, 372 years in this room. That's something that we can start working from and drawing from. It's actually about your experiences. We want to hear about your stories. We don't want to hear about ours. It's all about you. And then we go through, you know, our customer service promise and principles and then Also, you know, I didn't want paper, right? So what's the point of a training workbook? Honestly, I always talk about them collecting a thick film of dust. You know, whoever really looks at their training workbooks that they look at.

**Michelle Ockers** I will say, Simon, I do have some training workbooks that I go back to.

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Am I the outlier? I'm doing a storytelling program at the moment and their workbook is fantastic, but I do have a digital copy of it to use on the template. So what format, what resources do you give people? Tell me a bit about that.

**Simon Jobson** So we did a digital flipping book or an e-book. So it is beautiful, beautifully designed. It was about 50 pages in the end, but a lot of it we then went out and shot a tremendous amount. I think it was about 10, 12 videos of employees out and about talking about memorable moments that they said.

**Michelle Ockers** Nice. So you can embed things like that more readily in a digital format, right?

**Simon Jobson** Yeah, a hundred percent. And then so with those videos that we made, they were contextualized about each of the custom service principles. So I remember this time we communicated clearly on this first impression counts or friendly and ready to help. These are part of the principles that we have. And then people go and actually watch the video on the iPad. So we had iPads out for everyone. And so on the whole it was far more engaging and interactive for our people. So they actually seen videos rather than us telling them what to do. And then they could interact with that digital media and they'd break out and do sessions like that. So I found that. And of course, then you can download as a PDF. We put a learning hub for those who are more self-directed in their learning or more motivated in that sense. They can then go and actually download and have your beautiful workbook. But it's up to them. I don't want to waste paper for 1800 people. Yeah.

**Michelle Ockers** And we are having to be a lot more conscious of sustainability these days and impact on the environment as well. Right.

**Simon Jobson** Yeah. Yeah, absolutely. And look, you know, we then you know went through our evolving customer and evolving transport. So we looked at a whole like a whole bunch of compliments and complaints. I like to actually, my expression is, I like to, it's good to whack your learners, you know, in the face with a fish every now and then to make them really see how to draw emotion. And what I mean by that is seeing the complaints and what some people would say, you know, and the only question you need to ask is how does that make you feel?

**Michelle Ockers** Yeah.

**Simon Jobson** How does that make you feel? And then we would explore and tease that out and then go, well, what do you think that the person should have done differently? What was their behavior like? It's always bound down to behavior. It's always about the way they interact with the people. Complaints aren't often about people's lack of technical knowledge. It's actually about the way that they interacted. And then, you know, we explore understanding other people's worlds, mindset, mood, memorable moments. And we work through this toolkit where we devise a whole bunch of new language, simple language, that our customers had said. I should have also mentioned, you know, I had a really interesting experience years ago at Qantas. We went out to Auckland for this program with a bunch of externals,

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and they had this great question right at the beginning of the day. They said, what do your customers think? And there was about 30 of us in the room, and we were all, you know, they like this and they like that, and we all sort of garbled out what we thought. And then they said, have any of you spoken to any of your customers? And there was silence. When was the last time you actually spoke to a customer? And everyone just went, oh, a little bit earlier. And so they said, right, on your feet, in pairs, here's a bunch of questions. Go speak to some customers for the next hour. Well, you imagine what the execs thought. Oh, golly gosh. But it was a very profound experience for me. And who am I with my executive bias or my customer service bias even that I had that I think I know what people want when I really don't have a clue. So, part of actually, I should have said it in the setup on the pre, we got B learning and external or great externals that we used with Joey Kerrigan's team. They went out and interviewed 120 customers. So we actually had customer, real-life, real-time customer data from four different stations. Because, you know, who am I to tell them what our customers want? You need to actually speak to your customers and use that information as well. So part of that was demonstrating that as well, which I think was really important. We also had really great, we have customer profiles. So I find also when you're designing, speak to your marketing team. It's amazing. the wealth of information that they have. So they have a whole bunch of customer profiles.

**Michelle Ockers** Like personas?

**Simon Jobson** Yeah, exactly. Yeah. So we had public transport, they had rejecters, we had public transport progressives, public transport indifference, young reluctance, cautious travel and all these sort of people. So we would then demonstrate them to our people. Do you relate to any of these? Do you know any of these people? And then they would select and say, well, how if you had them? And we'd give them some scenarios, and how you interact with those particular people, and how could you actually change it from a 7 to a 9. And, and we sort of explored that as well. And then we, they took us into Empathy Mapping under those people, which is a really interesting, I'd never really done it before. My team were really big. We'd done it previously, and it really works. I mean, there's horses for courses, but at Sydney Trains, the empathy mapping, understanding customers and other people's worlds and trying to explore that and trying to get that as a ground foundational base, it's quite a nice trigger for a lot of people in Sydney Trains. Honestly, I mean, the team wanted to do it already, you think? And then when we did it, it really had a nice sweet spot.

**Michelle Ockers** So you got people to do that in the workshop itself?

**Simon Jobson** Absolutely. Yeah, we got these big, big things, you know, these big A2, A1 sheets and so forth. So that was cool. And from that, your mindset, mood. And so it was quite really digitally hard. So a lot of sort of multimedia. We really wanted to make it as engaging from that perspective.

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**Michelle Ockers** Hey, Simon, do you think we might be able to provide listeners with access to just a few samples, maybe a digital postcard example or one of the story videos?

**Simon Jobson** I think so. Yeah. Yeah. I can see whether. Yeah. Let's have a look at that.

**Michelle Ockers** And so people check out the show notes. If you want to have a look at some of these assets, hopefully we'll get approval for that. So if they're not there, you'll know that for some reason we weren't able to get access to those. But I think that would be a really interesting thing for people to take a look at. You've spent so much time crafting these assets, right?

**Simon Jobson** Yeah. The other thing, look, I'm I think a lot about is physical environment. So we have a traditional place where we do our learning and it's okay. It's fine. And a place that we have.

**Michelle Ockers** There's a whole set of training rooms, right? A training facility.

**Simon Jobson** Yeah, they've been there since the 1970s. And I wanted to take the learners out of that environment. Because I think there is some form of kind of learning bias sometimes when you continually going back for this operational school based learning. I wanted to take them somewhere fresher. So we have an Elizabeth Street in the CBD with these beautiful offices, these beautiful big rooms. And I got my team to book out for about, you know, as a year in advance, beautiful floor to ceiling rooms, beautiful natural light, huge spaces where people could explore area far better than where they traditionally would go. And it was really so that they not only were we trying to approach the learning in a different way through the postcards and the digital media, blah, blah, blah, and all that. But it's actually the physicality of it all and then going into the space as well. And I think from a mindset of those people sucking lemons before they came into the room, putting them in a different physical environment is really, really important. It's an important element that sometimes you don't think you don't think about, or you don't have time to think about, or you can't because of

**Michelle Ockers** So much thoughtful signaling, Simon, right throughout this experience. I just really, really want to call that out as something very admirable for people to think about. How can we signal using things like environment and the pre-session comms and so on to create a different level of experience for people?

**Simon Jobson** Yeah, and look, one of my favorite sayings as well, you know, learning should be problem centered rather than content driven.

**Michelle Ockers** Oh, I love that. Way too much focus on content when we design, right?

**Simon Jobson** Yeah, just straight away. And it's about contextualizing and being scenario driven. But we worked really hard on the scenarios being quite tough. Yeah.

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So what I mean, you know, not just some really random scenario that might never happen, it's kind of making them kind of vague and kind of difficult to work through and hoping that some people might have a different opinion about how to approach it so that they themselves can work together what could be a good piece of advice or how they would approach that. And there's a whole bunch of other stuff, you know, particularly people being more digitally enhanced, shall we say, you know, and talking about the apps and how you way find and what apps do you use? Because we have a whole bunch of different apps you can use to show people how to get to certain places and exploring that as well.

**Michelle Ockers** You know, I remember at Qantas and you were working in a customer service area at Qantas when I first met you as well. And one of the challenges Qantas had was that because the staff book their flights differently to the way regular customers do. A lot of the staff didn't know how to use the customer service apps who are in those customer facing roles, right? You had to actually upskill them to be able to relate properly to the customer experience and learn how to use the apps because they weren't using it for their own customer experience.

**Simon Jobson** Yeah. And sometimes you do uncover these kind of disconnects within the business operation and you sort of scratch your head and it's like, you know, why is this? And I suppose part of our job is to best identify that and about how best to rectify that in a really positive, engaging way.

**Michelle Ockers** We're in a good place to connect dots across the organization. Yeah. All right. So let's talk about you've got the event and then after the event, the post.

**Simon Jobson** Yes. So the post is I'm a little bit obsessed with the post, right? Because I find, you know, and when I really started my prop L&D journey, and, you know, you were very much part of that, Michelle, when we were working together and getting me to think through different ways, is that forgetting curve, I just can't get it out of my head, right? Yeah. You know, what's the point? Like, as you said, oh, it sounds lovely, Simon, you put all these wonderful things together, this is really engaging videos. But what's the point? I mean, who's going to forget about it in 30 days time, right? So, How do you engage with that and part of that was the forget me not app. I suppose a plug for the obvious choice guys but the externals but it's a really clever learning app that people can engage with and you come up with a series of six questions where you need to get three questions right in a row to master it. But it's set up with some clever learning algorithms. So you answer questions and say day one, two and three. And if you're learning it, you don't get a question then until like day eight, nine or 10. And then so for that space learning repetition that helps you commit memory to your prefrontal cortex and actually really immerse or engage that learning to muscle memory, if you like. It's quite powerful and it's really interactive and they ask quite, the questions are quite difficult. Again, you know, questions are more important than answers, I think is a really important learning construct. And so what we did is at the end of the session, we had everyone had to download the app. And then they had to continue with that learning. So then, you know, we had something like the stats were something like 18,000 hours worth of



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learning continued after the program where we were aligning the actual customer service principles and actions and activities with it. And it only takes one or two minutes a day to do it on your mobile device. So I was really big and I was really big on making sure that happened. We also did, so that was that continuous learning post, the workshop construct. And then we also had a bunch of other little ways that we did it. We had simple MS forms. They had to do three actions, or one to three.

**Michelle Ockers** So they set an intent, like some sort of action they're gonna take at the end of the day.

**Simon Jobson** Yeah, exactly. That's exactly it, you know. So, commitments. So, we had key commitments. One to three, maximum three, never more than three, right? Right, no one's going to do any of them. But the key to that was, it was more for our area managers. So, when they're going around and they see someone, they say, have you been to Elevate lately? And the person will say, yes. They go, show us your mobile device, what are your commitments? there was kind of a bit more of a conversation starter and to help enable management and the leaders to actually have those interactive conversations with people about their learning. And we also had, it was a funny one, it was pins.

**Michelle Ockers** Yeah, I was going to make sure you told us about the pins. This is amazing. I find pins funny. What is a pin? When you say a pin, Simon, just go into that a little bit more. On your lanyard.

**Simon Jobson** If anyone of you are in Sydney trains and you're getting on a train, you'll see people with their lanyards and they have a bunch of pins which identify something like 10 years.

**Michelle Ockers** So the lanyards are worn around the neck, right? They might have a badge on it or access passes or something like that.

**Simon Jobson** Identification. Exactly. And what we came up with was cool. So we had our elevator image, we turned it into a pin, So through our sort of human-centered design, through our workshops, the employees told us that they love pins. Yes. With my bias, I would never go, who wants a pin? I don't get it. I don't connect on that. But people do. So you had to do the training. You had to be handed the pin right at the end. So everyone put their pin on. And then when they went out back out onto the station, it was a physical identifier for the manager to go and say, oh, So you've done the Elevate training, how did it go? And it's a conversation starter. The other element that we used for it was when I was speaking earlier about the mystery shoppers, so the persons going out and physically identifying with the people out on the station platforms, they would note that they had a PIN and then they knew that they were an Elevate person. And then Ipso facto, from a return of investment, we were able to track how their behavior was. And we saw a 5% increased shift in customer service performance.

**Michelle Ockers** On the mystery shopping, right? So you just had some sort of box or some way that the mystery shoppers could go, yep, they've got an Elevate pin.

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**Simon Jobson** And they were tracking on it via that way.

**Michelle Ockers** It's so clever.

**Simon Jobson** So yeah, so we made sure that there were those physical identifiers.

**Michelle Ockers** Yeah.

**Simon Jobson** for not just management, but also these mystery shoppers that are out there observing. And so that was a way that we could try our best to track our ROI to see how we were performing overall.

**Michelle Ockers** So what did you find when you, so I assume that you looked at kind of the mystery shopper data, you talked about a stack of other customer service data. So what were kind of the key indicators of the impact you were having when you did your evaluation gathering that data?

**Simon Jobson** Yeah, so for our customer sentiment surveys as well, we saw a 5% score increase. And also, obviously, through the pin recognition and through the mystery shopper. And of course, if I evaluate, I mean, the key, one of the other things just for me from a personally, I suppose, from a personal L&D selfish point of view, you know, we had 96% agreed or strongly agreed that Elevate would assist them to apply the six customer service principles in the everyday working. And you know, when you have people coming in and you're trying to break down these silos of learning and to get them more engaged and to have 96% of 1,700, 1,800 people, that was a sort of a real proud moment, I think, for the team. that part of what they were delivering was engaging and the people were really into it and really enjoyed the day.

**Michelle Ockers** And they're also indicating their intent to apply. I'm a big fan of Will Talheimer's work on evaluation, very strongly evidence informed. And one of the things he talks about is we can nudge behavior with our evaluation. So by getting people to think about to what extent am I intending to apply, you're starting to nudge them to look for opportunities to apply as well. 100%.

**Simon Jobson** Yeah, no, he's fantastic. And so I think it was through these sort of multiple different sort of areas, we were able to produce a narrative, particularly quite strong in our ROI. and to demonstrate back to the business what we've done.

**Michelle Ockers** Brilliant. So Simon, I'm conscious that we're coming up to time and I want to make sure we leave listeners with kind of something people are going to take away from this, by the way, but with a kind of a little capsule of tips. So if people are looking to create, let's just stick with the question on customer service programs and their organizations, what would be your key kind of up to three tips?

**Simon Jobson** I think articulate your ROI from the beginning and be really clear on that, and be really clear on how you're going to track it. I think that's an area in L&D

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that isn't done as strongly. People talk about it, but they don't do it as much. I think for me, focus on the complete journey. And what I mean by that is your pre-during post. That's a real saying that I like. But don't just focus on the during. the actual learning construct. It's about what you're doing before and what you're doing after and how effectively are you really thinking through that. And I think sort of challenge yourself. I think challenge if you've got, if you're working with consultants. We did and we did for a portion of it at times. Challenge them, do you know, challenge them on the media content. And I think also surround yourself with quality people and be creative. You know, one of the learning, one that I really like, some of the stats that are coming out of COVID right now, if you work from home, we find that people are far more productive, but you're not as creative.

**Michelle Ockers** Oh, that's so interesting. Have you found some research on that?

**Simon Jobson** Oh yeah, a hundred percent. I've got the research.

**Michelle Ockers** Well, let's just as a little bonus thing, let's pop that in the show notes as well. I'm very interested in that.

**Simon Jobson** Oh yeah, yeah. It's from John Medina's work.

**Michelle Ockers** Great. John Medina of Brain Rules fame?

**Simon Jobson** Yeah, but it's from Brain Rules. There's Brain Rules in the workplace. Oh my God. Honestly, I don't know John Medina at all. To all you listeners, I have no idea. I've never met him in my life, but I tell you what, his stuff is gold dust. So from his book, The Workplace One, which I was reading, but if you want to make a creative decision, you need to be face-to-face and then you get it. And of course, to make creative decisions, you need far more diverse people, far more, the more women you have, the better. If you're around plants, you should get lots of plants around you. I'm looking at my plants here. My team, if my team are listening to this, they'll laugh. And also it's important about how high your ceiling is. The higher the ceiling, the more creative part of your decision, your creativity would be. So as a joke, if you're trying to make a creative, decision or a group learning, you should really do it in a church because they have beautiful high ceilings.

**Michelle Ockers** They do indeed. What a nice thought to wrap up. It's been a thoroughly enjoyable conversation.

**Simon Jobson** Thank you.

**Michelle Ockers** Really, really pleased. And you reached out to me about this and listeners. I'm always open to considering a story, so reach out to me, either about your own work or someone else's, and we can have a conversation and see if it's great for a podcast episode. Thank you so much for doing that, Simon, and thank you for sharing all your insights with the listeners. We will have a link to your LinkedIn profile in the show notes, as well as For everyone, please take a look at the resources for this podcast episode on the website. I have a whole page full of notes

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around supplementary resources for people to go away and dig into, Simon, that will help them to bring some of what you've talked about to life. Thank you so much for your time today.

**Simon Jobson** My pleasure. It's been a blast. Lovely, lovely catching up with you again, Michelle.

**Michelle Ockers** And you too.



Learning Uncut are learning and development consultants that help Learning and Development leaders and their teams become a strategic enabler so that their businesses can thrive. We work in evidence-informed ways to drive tangible outcomes and business impact and are strong believers in the power of collaboration and community. We specialise in helping to build or refresh organisational learning strategy, update their L&D Operating Model, enable skills development, and conduct learning evaluation. We also offer workshops to shift learning mindset and practices for both L&D teams and the broader workforce – as well as speaking at public and internal events.

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### About your host, Michelle Ockers



Michelle is the co-founder and Chief Learning Strategy at Learning Uncut. She is an experience, pragmatic organisational learning strategist, L&D capability builder and modern workplace learning practitioner. She also delivers keynotes, workshops and webinars for learning and broader professional or workforce groups at both public and in-house events.

Michelle received the following prestigious industry awards in 2019:

- Australian Institute of Training and Development Dr Alastair Rylatt Award for L&D *Professional of the Year* – for outstanding contribution to the practice of learning and development
- Internet Time Alliance Jay Cross Memorial Award – for outstanding contribution to the field of informal learning



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