



SB 5537 Budget Note Report

Plan to Modernize Customer Call Centers

February 1, 2023

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Contents

- 01** Budget Note
- 02** Project Overview
- 03** Steps Taken
- 04** Next Steps

SB 5532 (2021) Budget Note

The Department of Revenue will report to the Joint Committee on Ways and Means by January 2023 on a plan to modernize and enhance its customer call centers. The plan shall identify and evaluate options for meeting projected demand; consider technology options for enhanced service such as artificial intelligence and machine learning; consider options for offering 24-hour service to customers; develop strategies to optimize use of live assistance; and include strategies for meeting the increased demands of a surge event.

Project Overview



Activities Conducted



Analyzed public and private sector call centers



Surveyed & Interviewed employees



Reviewed process documentation



Assessed qualitative and quantitative information

Our Call Centers

1

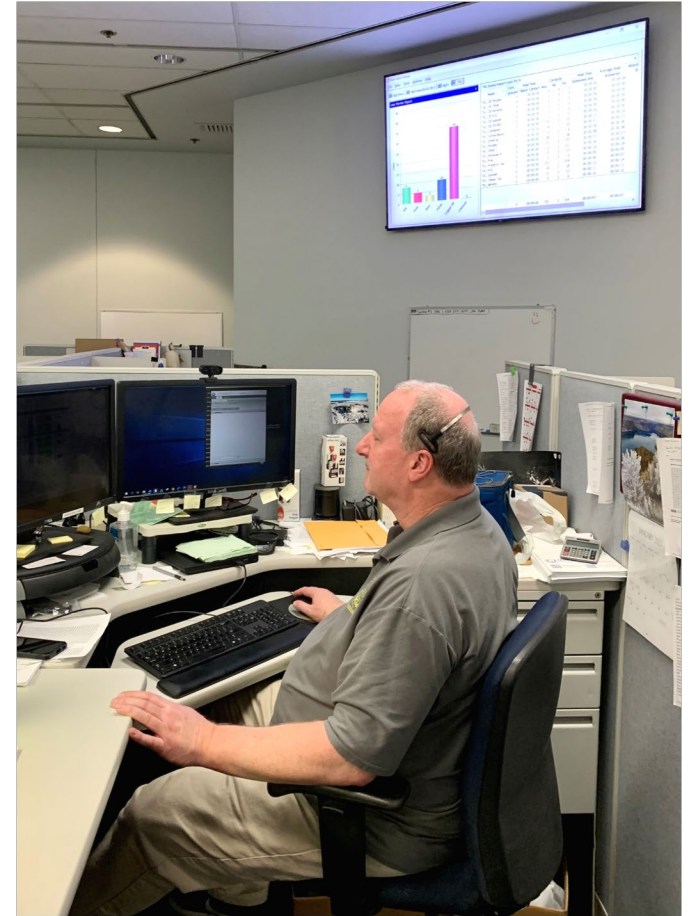
Main Customer Call Center

5

Specific Program Call Centers

3

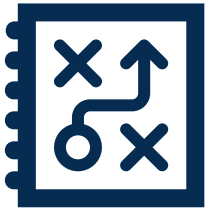
Specific Debt Collection Call Centers



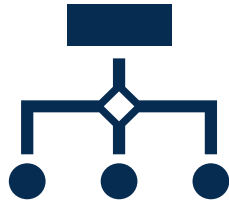
How Are We Doing?

Metric	Industry Average	DOR 2022 (Jan-July)	Why this matters
Average speed of answer	23-27 seconds	5 minutes 45 seconds	Responsiveness
Abandoned rate	Less than 4%	5%	Responsiveness
First contact resolution	Greater than 78%	Data not available	Responsiveness
Customer satisfaction	Greater than 80%	93%, based on 2% survey response	Customer satisfaction
Quality score	Greater than 90%	Data not available	Quality
Average handle time	5 minutes	12 minutes	Efficiency
Available time	85%	Not tracked	Efficiency
Agent utilization	81-82%	Not tracked	Efficiency
IVR Containment	Greater than 80%	36%	Efficiency

43 Key Recommendations



Strategy,
Planning &
Governance



Organizational
Alignment &
People



Process &
Operations



Tools &
Technology

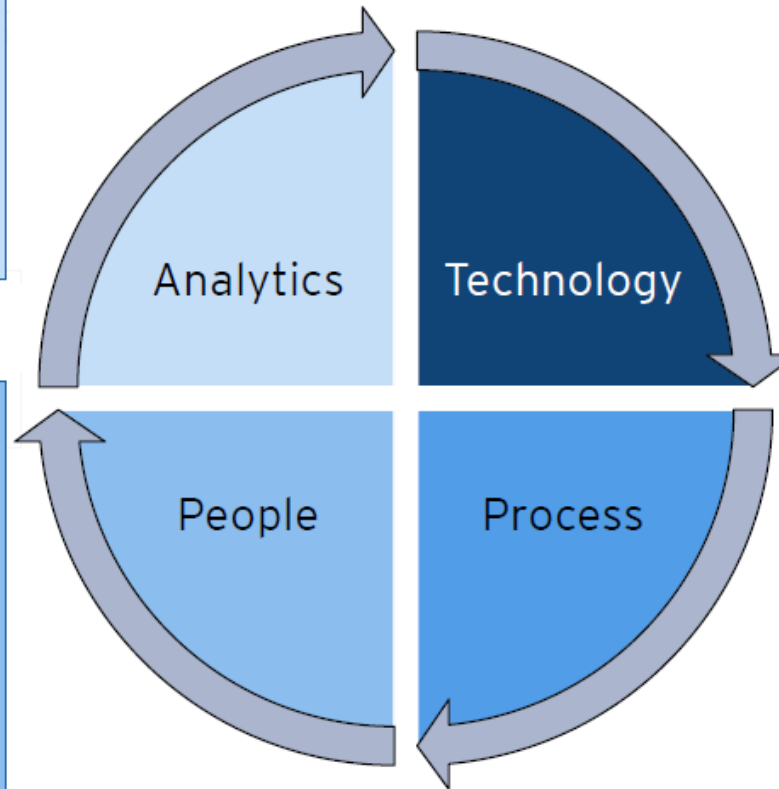


Measurement,
Insight &
Compliance

Unexpected Call Volume Strategy

- ▶ Provide early warning signs of high call volumes
- ▶ Identify the reason for calls
- ▶ Measure and track performance of changes made in people, process and technology layer

- ▶ Leverage metrics like average handle time, wait time, call back requests, etc. along with Erlang C model for determining appropriate agent count
- ▶ Cross-train agents across departments to provide support
- ▶ Establish call center surge support contracts to enable adding agents to queues as higher call volume arises, and customer inquiries exceeds in house staffing capabilities

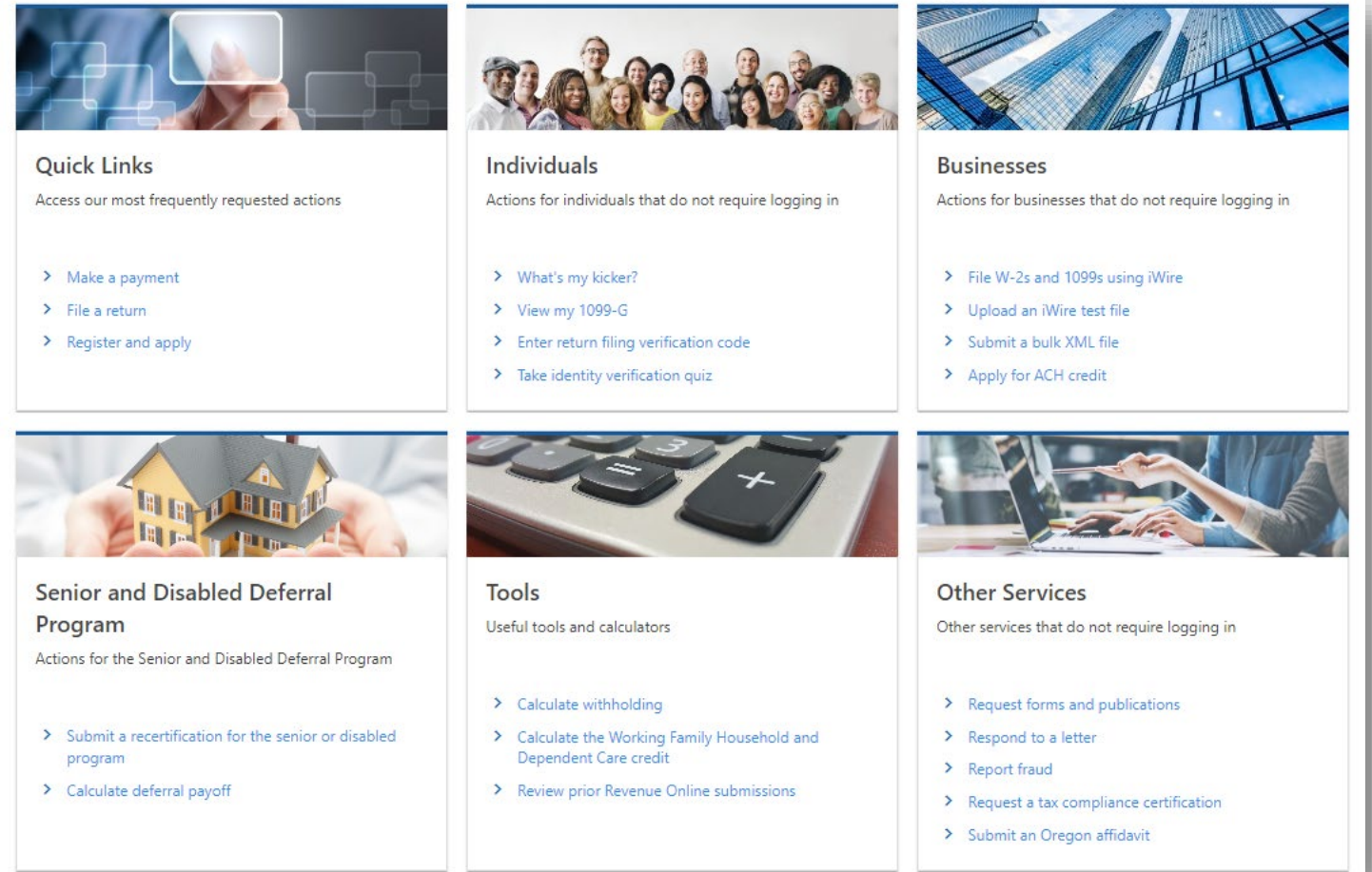


- ▶ Leverage proactive communications for outreach via emails, text message, voice bots, social media, etc.
- ▶ Update IVR with upfront messaging, prioritization of specific topics and deflection to self-service and digital channels
- ▶ Ensure agents are equipped with needed technology

- ▶ Temporarily extend call center hours
- ▶ Define call center shifts and assign workforce based on shifts
- ▶ Enhance communication amongst the impacted business units
- ▶ Evaluate performance in daily standups and dashboards
- ▶ Prepare team through table-top exercises
- ▶ Prepare team with cross-training in various call centers

Steps Taken

- ✓ Center of Excellence
- ✓ Data Analytics Strategy
- ✓ Website Update



The screenshot displays a grid of six navigation tiles on the Revenue Online website. Each tile features a header image, a title, a subtitle, and a list of links. The tiles are: Quick Links (top-left), Individuals (top-middle), Businesses (top-right), Senior and Disabled Deferral Program (bottom-left), Tools (bottom-middle), and Other Services (bottom-right).

Tile Title	Subtitle	Links
Quick Links	Access our most frequently requested actions	<ul style="list-style-type: none">> Make a payment> File a return> Register and apply
Individuals	Actions for individuals that do not require logging in	<ul style="list-style-type: none">> What's my kicker?> View my 1099-G> Enter return filing verification code> Take identity verification quiz
Businesses	Actions for businesses that do not require logging in	<ul style="list-style-type: none">> File W-2s and 1099s using iWire> Upload an iWire test file> Submit a bulk XML file> Apply for ACH credit
Senior and Disabled Deferral Program	Actions for the Senior and Disabled Deferral Program	<ul style="list-style-type: none">> Submit a recertification for the senior or disabled program> Calculate deferral payoff
Tools	Useful tools and calculators	<ul style="list-style-type: none">> Calculate withholding> Calculate the Working Family Household and Dependent Care credit> Review prior Revenue Online submissions
Other Services	Other services that do not require logging in	<ul style="list-style-type: none">> Request forms and publications> Respond to a letter> Report fraud> Request a tax compliance certification> Submit an Oregon affidavit

Revenue Online

Next Steps



Continue to implement the recommendations



Remain focused on our vision: to create a clear and easy experience for our customers



Prepare for a surge event



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