



*"Working together to
fund Washington's future"*

Customer Service Enhancements

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September 9, 2014



Overview

- Live Chat
- Methods for customer feedback
- Customer service dashboard/scorecard
- Feedback
 - ✓ Gather
 - ✓ Analyze
 - ✓ Measure

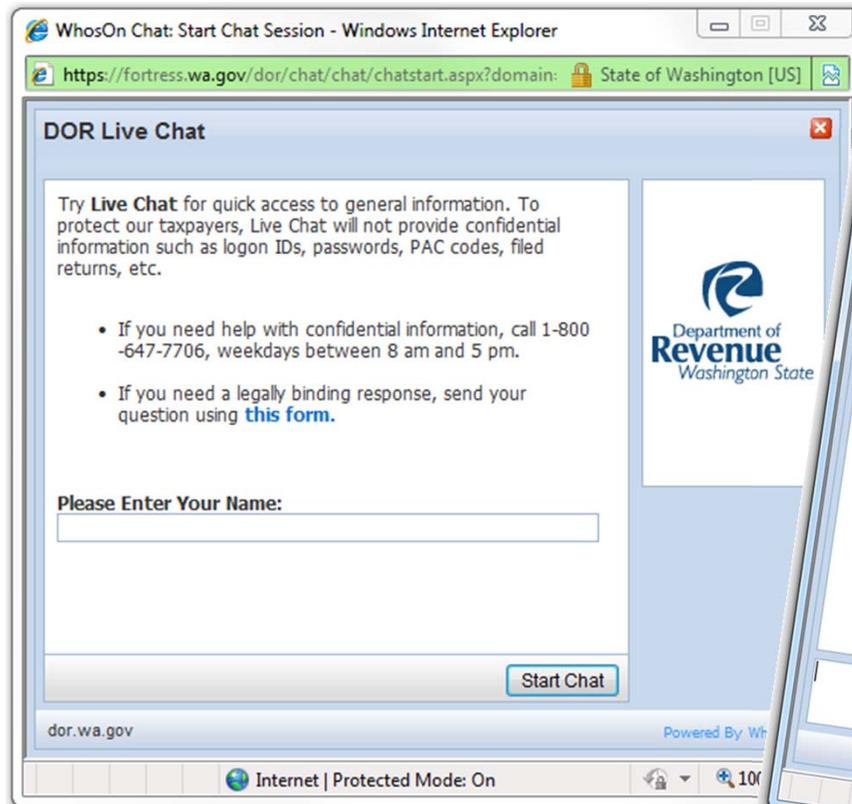
Live Chat

- **Timeline:**
 - Contract signed November 12, 2013
 - Soft Launch December 26, 2013
 - Official “Go Live” on January 2, 2014
- **Stats (January 2-June 30, 2014)**
 - 5,704 chat requests received
 - ✓ Average 60 chats per day
 - ✓ Phone Center down 5,500 calls compared to same period last year – almost 1:1 ratio!
 - ✓ One FTE supporting chat
- **Added Chat links to 17 of the top 25 most visited web pages**

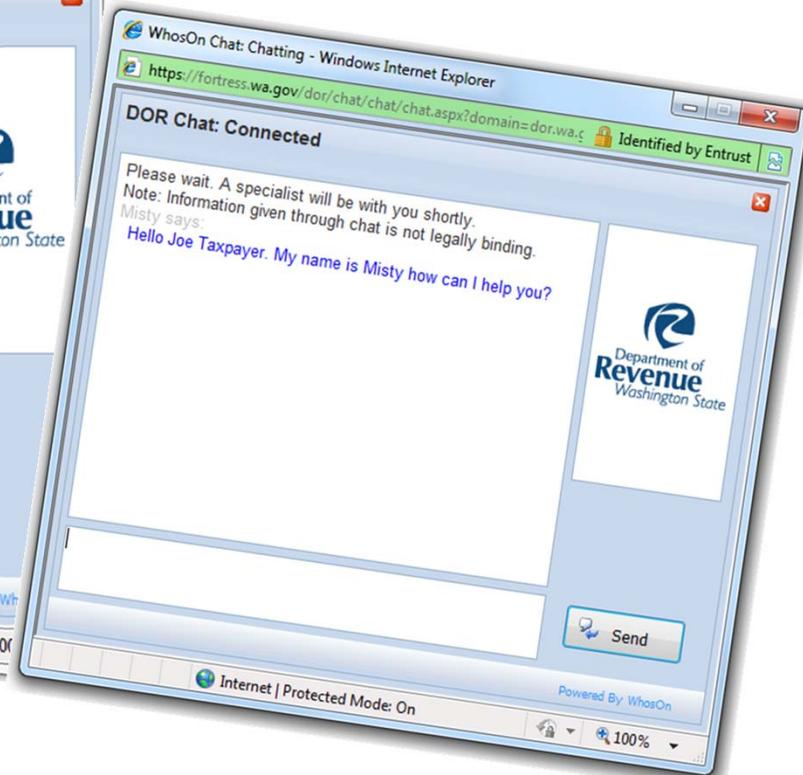


Live Chat - Taxpayer View

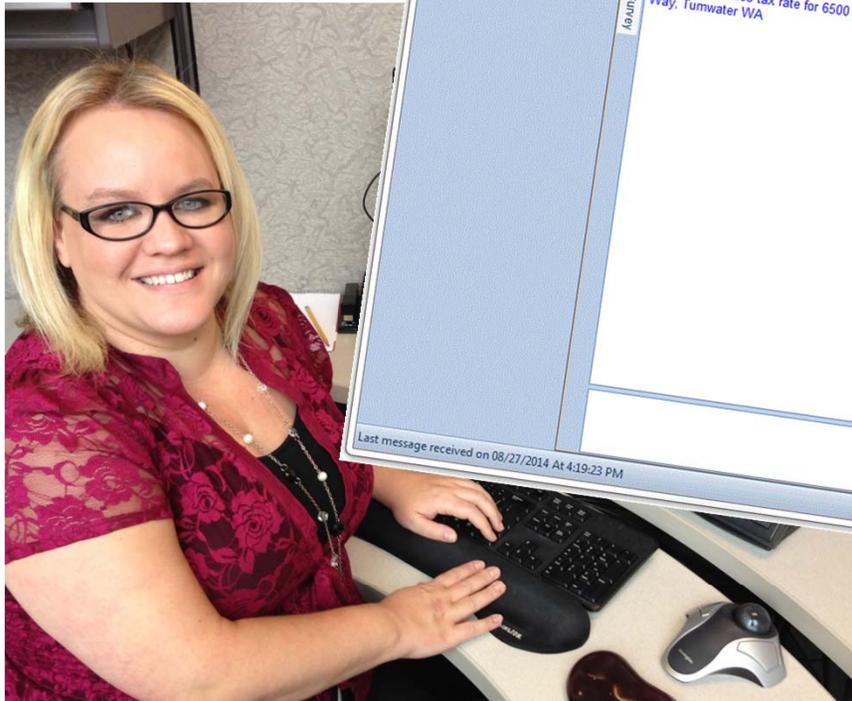
Start Window



Chat Window



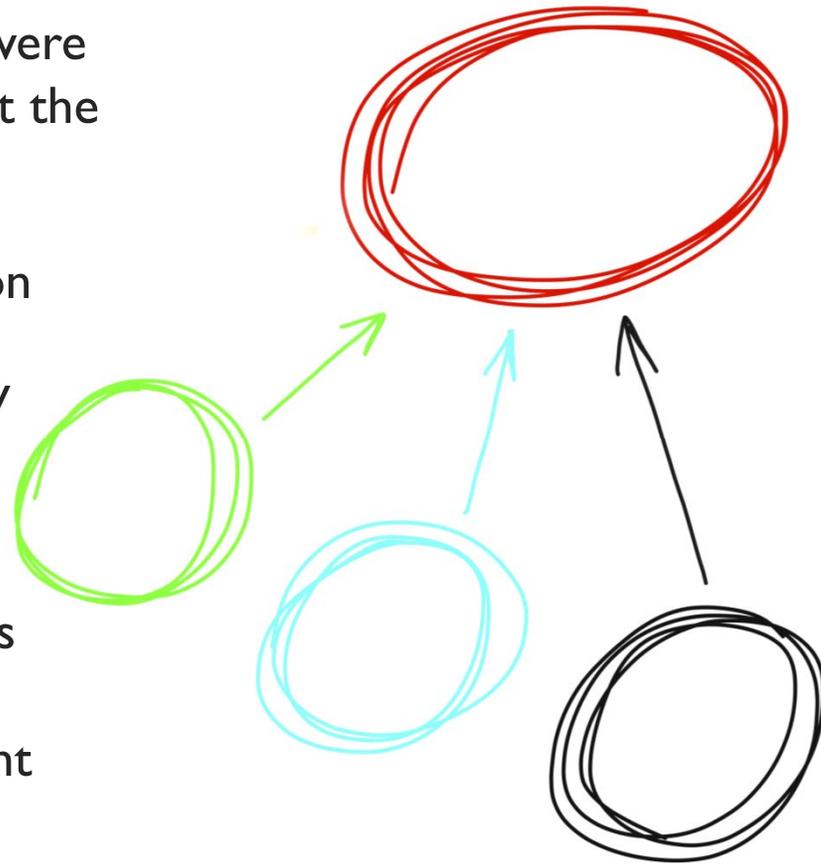
Live Chat - Agent View



Methods for Customer Feedback

Eleven recommendations were submitted for approval to assist the agency in:

- Gauging customer satisfaction
- Collecting data for an agency customer service performance dashboard
- Supporting Governor Inslee's Goal 5: Effective, Efficient, and Accountable Government



Highlights

1. Conduct Taxpayer Satisfaction Survey
 - *Cost – approximately \$47,000*
2. Investigate commercial products offering customer feedback solutions
 - Transactional surveys
 - Customer feedback
3. Explore options to contact new businesses
4. Require divisions to seek feedback from customers
5. Offer business roundtable events annually throughout the state

Agency-wide Involvement

Customer Feedback Workgroup

Group of cross-divisional representatives lead by the Customer Service Advocate with the following responsibilities:

- develop agency survey guidelines;
- oversee all surveys conducted by the agency or divisions;
- review the Taxpayer Satisfaction survey questions, results, and provide recommendations to management; and
- issue annual Customer Service Report.

Customer Service Dashboard/Scorecard

Process

- “What would make you 100% satisfied with DOR?”
- 250 responses
- Common themes
 - Availability
 - Ease of Use
 - Accuracy
 - Timeliness
 - Respectfulness



Description	Yearly Goal	Fiscal year to date 2015
Make conducting business with the department clear, simple, and efficient		
Percent responding favorably to ease of use of Agency website	90%	
Process on-line Business License applications within 2 business days	100%	
Process paper Business License applications within 3 business days	100%	
Answer incoming call center calls within 1 minute	80%	
Process Unclaimed Property monetary claims within 30 days	90%	
Percent responding favorably to the following statements: *I was treated with courtesy and respect *I was provided clear and accurate information *I was responded to in a timely manner	85%	
Percent of customer satisfaction with overall service received from Agency	85%	
Maintain Agency website availability	99.9%	
Promote correct and timely reporting and payment of taxes		
Complete refund requests not requiring audit verification within 10 business days	95%	
Provide answers to written ruling requests within 10 business days	85%	
Increase usage of current mobile apps	288,722	
Promote fairness and consistency in the development and application of tax law		
Publish an average of 60 Washington Tax Decisions (WTD) per year	60	
Adopt, amend, or repeal 75 agency rules or interpretive statements to recognize legislative changes, court decisions, and current business practices per year	75	

Gathering Feedback

- Web survey
- Taxpayer Satisfaction survey
- Division level surveys
- Customer Feedback system



**Help us
improve!**
Take our Survey

DOR Web Satisfaction

1. What was the purpose of your visit? (Check all that apply)

- File my taxes
 - Find a tax rate
 - Look up a business or verify a reseller's permit
 - Get business licensing and renewal information (BLS)
 - Get a form or publication
 - Get statistics or reports
- Other (please specify)

2. Did you find what you were looking for?

- Yes
- No
- Not sure

Comments

3. Please rate this website for each of the following:

	Excellent	Good	Fair	Poor	Have not used
Easy to use	<input type="radio"/>				
Clear information	<input type="radio"/>				

**Help us
improve!**
Take our Survey

Taxpayer Satisfaction Survey



Excellent
 Very good
 Good
 Average
 Poor



2014

Taxpayer Satisfaction Survey

Sponsored by
Washington State Department of Revenue

Conducted by
Social & Economic Sciences Research Center
Washington State University
PO Box 641801
Pullman, WA 99164-1801

- Q1. Are you the person who fills out the tax return?
1. Yes
 2. No
- Q2. Which of the following best describes your position? (Please select ONE answer.)
1. The business owner
 2. CPA or other tax professional
 3. In-house tax department employee
 4. Employee
 5. Something else (Please describe): _____
- Q3. How many years have you personally interacted with the Department of Revenue?
1. 0-2 years
 2. 2-5 years
 3. Over 5 years
- Q4. How satisfied are you with the overall quality of service you receive from the Department of Revenue?
1. Very satisfied
 2. Somewhat satisfied
 3. Somewhat dissatisfied
 4. Very dissatisfied

Taxpayer Satisfaction Survey

Q15. How much do you agree with each of these statements about the Department of Revenue and its services? (Circle one number for each.)

	Strongly agree ▼	Somewhat agree ▼	Somewhat disagree ▼	Strongly disagree ▼
A. Online filing and payment application (E-file) is user friendly	1	2	3	4
B. Tax forms and instructions are easy to understand	1	2	3	4
C. Changes in tax laws and rules are communicated timely	1	2	3	4

Q16. The Department of Revenue makes it easy to give suggestions or submit feedback.

1. Strongly agree
2. Somewhat agree
3. Somewhat disagree
4. Strongly disagree

Q17. How important is it to access each of these services on a phone, tablet, or other mobile device? (Circle one number for each.)

	Very important ▼	Somewhat important ▼	Slightly important ▼	Not important at all ▼
A. E-file (electronic tax filing and payment)	1	2	3	4
B. Business information lookup	1	2	3	4
C. Renew a business license	1	2	3	4
D. Reseller Permit Lookup/Verification	1	2	3	4
E. Renew my organization's non-profit property tax exemption	1	2	3	4

Q18. Please tell us how the Department of Revenue can improve our service to you.

Customer Surveys – Division level

DOR Office Taxpayer Survey

Our goal is simple—we want to provide you with friendly, helpful service. Your input helps guide our changes. Please share your thoughts by completing this quick survey.

Q1. What Department of Revenue office did you contact?

- | | | | |
|---------------------------------------|-----------------------------------|---|---------------------------------|
| <input type="checkbox"/> Bellingham | <input type="checkbox"/> Richland | <input type="checkbox"/> Tumwater (Licensing) | <input type="checkbox"/> Yakima |
| <input type="checkbox"/> Bothell | <input type="checkbox"/> Seattle | <input type="checkbox"/> Tumwater (Tax) | |
| <input type="checkbox"/> Kent | <input type="checkbox"/> Spokane | <input type="checkbox"/> Vancouver | |
| <input type="checkbox"/> Port Angeles | <input type="checkbox"/> Tacoma | <input type="checkbox"/> Wenatchee | |

Q2. I wanted help with? *(Circle all that apply)*

- A. Business registration requirements
- B. Specialty business license (liquor license, nursery retailer, etc.)
- C. Renewing my professional or business license
- D. Vehicle/vessel/aircraft issues
- E. Make a payment
- F. File and pay taxes
- G. Tax Questions
- H. Other

Q3. How long did you wait before someone was able to help you?

- 1. 1-10 minutes
- 2. 11-20 minutes
- 3. more than 20 minutes

Q4. How long did you expect to wait?

- 1. 1-10 minutes
- 2. 11-20 minutes
- 3. more than 20 minutes

Customer Feedback System

The screenshot shows a web browser displaying the Department of Revenue Washington State website. The page is titled "Give feedback" and is part of a navigation menu that includes "Home", "File & pay taxes", "Doing business", "Find taxes & rates", "Workshops & education", "Get a form or publication", and "Find a law or rule". The main content area contains the following text and form elements:

Department of Revenue Washington State
"Working together to fund Washington's future"

ABOUT US | CONTACT US

My Account [login](#)
[e-file](#) [register](#)

Search

Home > ABOUT US > EMAIL > GIVE FEEDBACK

Give feedback

The Department of Revenue is committed to providing you with excellent customer service.

Please complete and submit this form if:

- You have a complaint about the service you received from the Department of Revenue, or
- You received excellent customer service and would like to let us know.

This form is intended for feedback regarding the Department of Revenue only, not to file a complaint about another state agency, a business, or the IRS.

Report Tax Fraud

- If you suspect or know of an individual or business that is not complying with Washington tax laws, you may report this activity at [SuspectFraud.wa.gov](#).

Please Note: Tax questions should still be directed to [General Tax Questions](#).

Type of Feedback:

Your Name:

Compliment Complaint/Concern

Are you registered to do business in Washington State? Yes No

Do you want a response to your feedback? Yes No

Feedback:

After you click Submit, you will receive a tracking number. Please refer to the tracking number if you contact us about this feedback.

Submit Reset

Internet | Protected Mode: On

Done

125%

Analyzing Customer Feedback

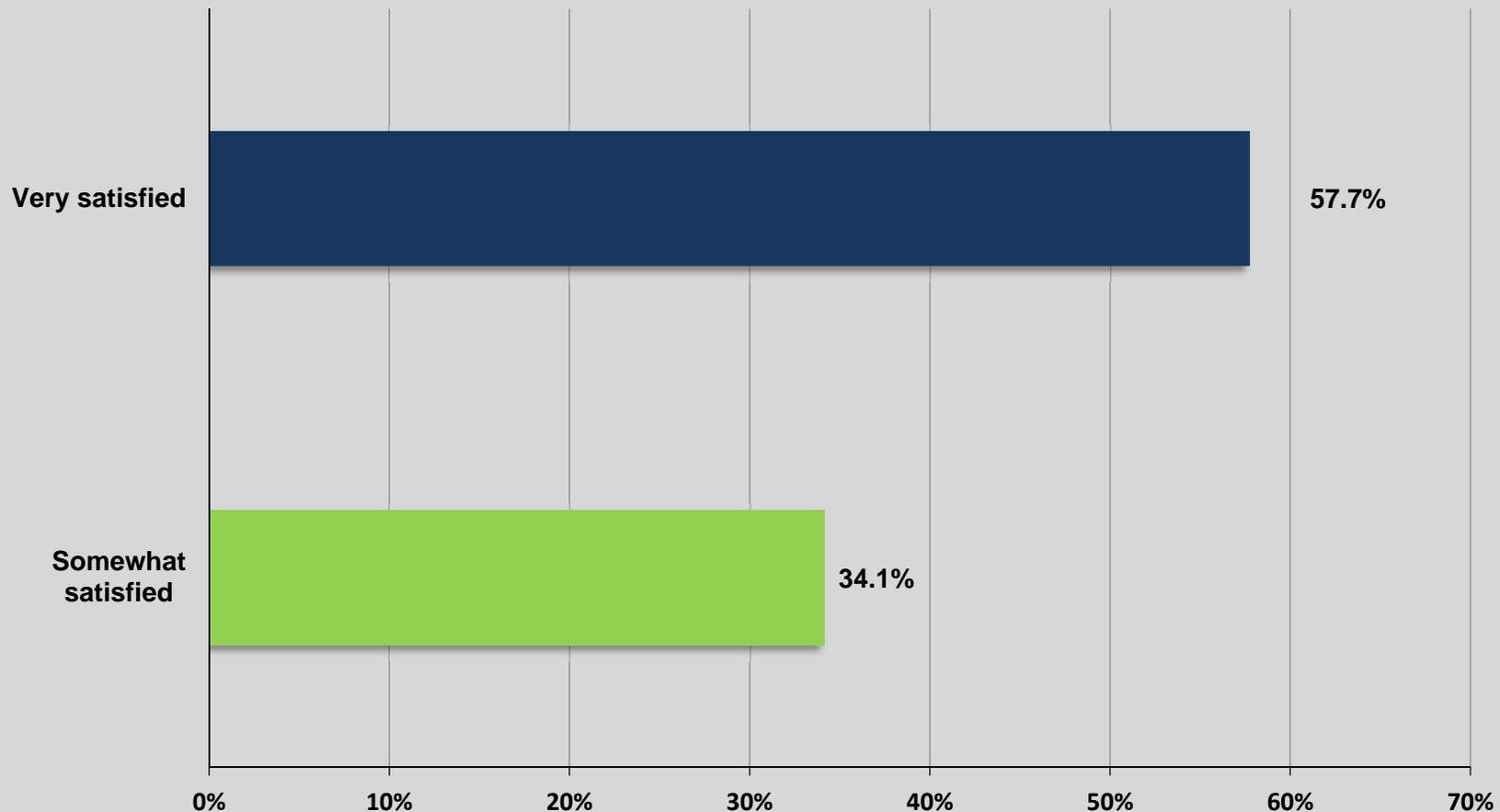
41 comments identified as possible improvements

Changes made due to feedback

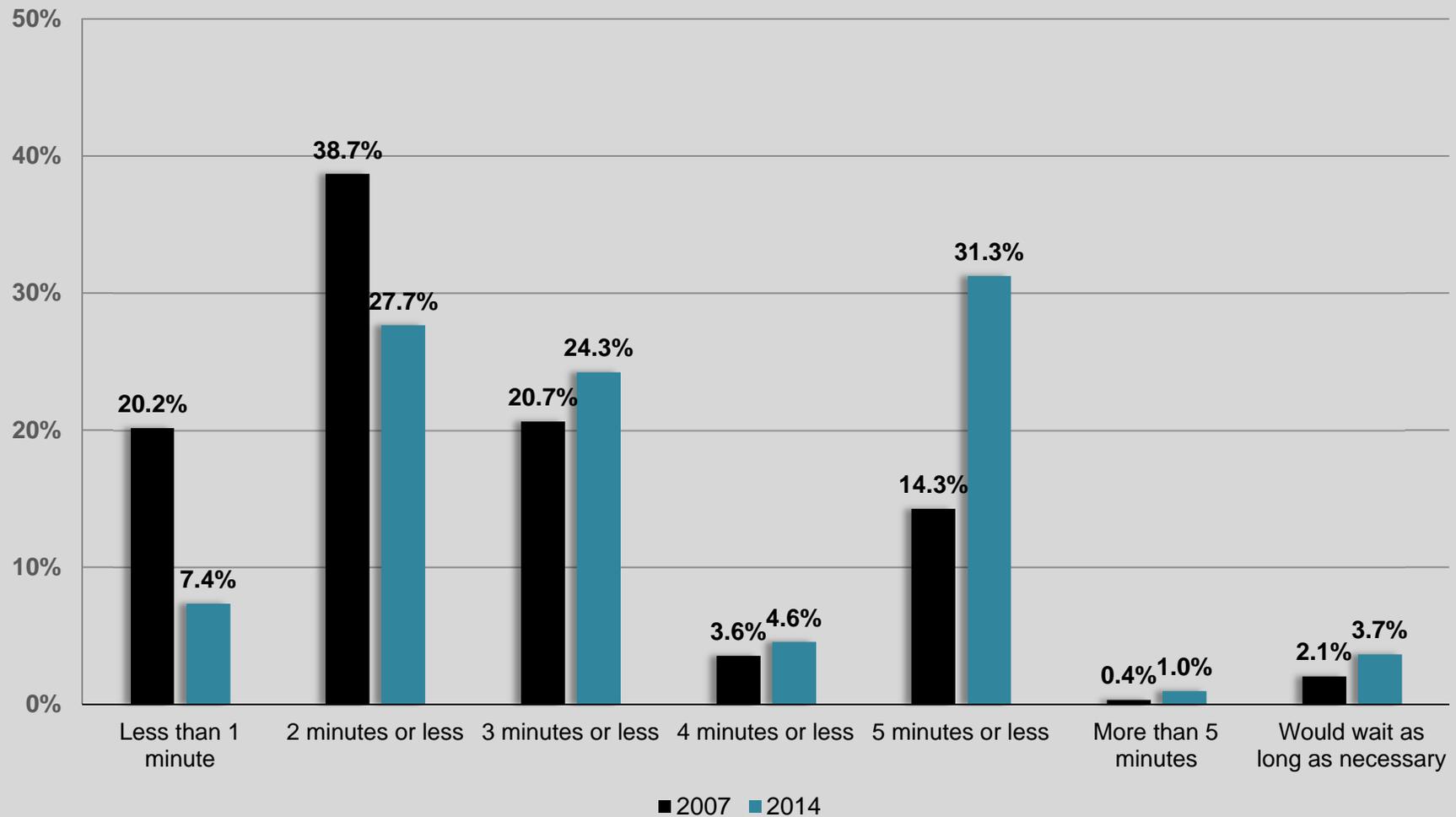
- Property Tax annual renewal postcard notice for nonprofits
- Problem with on-line fraud reporting
- Timber Extraction Special Notice rate confusion
- Field office availability
- Website redesign

Taxpayer Satisfaction Survey Results

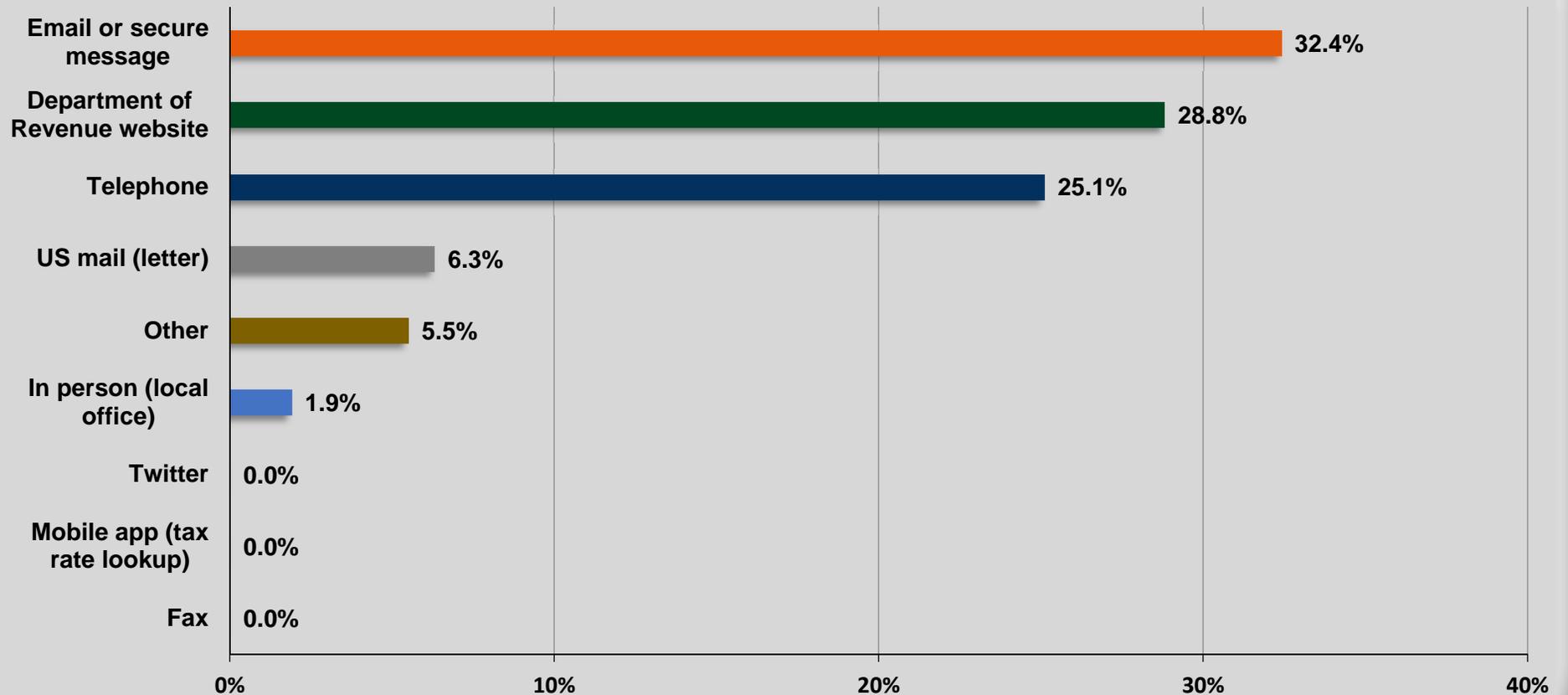
Q4. How satisfied are you with the overall quality of service you receive from the Department of Revenue



Acceptable Call Wait Time



Preferred Methods for Tax Assistance



Measuring Customer Feedback

- Issuing monthly dashboard
- Customer feedback
 - Tracking suggested improvements
 - Outcomes from suggestions



Year-end Scorecard

Goal/Key Measurement	Benchmark	Fiscal Year 2014	Goal Met
Make conducting business with the department clear, simple, and efficient			
Percent responding favorably to ease of use of agency website*	90%	57%	
Process online Business License applications within two business days	100%	100%	✓
Process paper Business License applications within three business days	100%	95%	
Answer incoming call center calls within one minute	80%	78%	
Process Unclaimed Property monetary claims within 30 days	90%	93%	✓
Percent responding favorably to the following statements:*			
- I was treated with courtesy and respect			
- I was provided clear and accurate information			
- I was responded to in a timely manner	85%	91%	✓
Percent of customer satisfaction with overall service received from agency*	85%	82%	
Promote correct and timely reporting and payment of taxes			
Complete refund requests not requiring audit verification within 10 business days	95%	95%	✓
Provide answers to written ruling requests within 10 business days	85%	93%	✓
Promote fairness and consistency in the development and application of tax law			
Publish an average of 60 Washington Tax Decisions (WTD) per year	60 WTDs	75 WTDs	✓
Adopt, amend, or repeal 75 agency rules or interpretive statements to recognize legislative changes, court decisions, and current business practices per year	75	119	✓

Contact

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