



Oregon

Tina Kotek, Governor

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DATE: May 3, 2023
TO: Joint Ways and Means Subcommittee on General Government
FROM: Betsy Imholt, Director
SUBJECT: Customer Experience Update

Background

The 2021 Legislature, through a budget note in Senate Bill 5537, requested that:

The Department of Revenue report to the Joint 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.

The department presented its plan to the subcommittee on February 1, 2023. The subcommittee requested the agency, “identify additional investments based on the EY findings and recommendations to present to the General Government Subcommittee for their consideration during phase II of the budget process.”

Customer Experience Plan

Modernizing our call centers requires a combination of staffing and technology investments over several years. We have organized the improvements into two phases.

Phase 1. 2023-25

This phase will focus on improvements related to strategy, planning, governance, organizational alignment, process, operations measurement, insight, and compliance. Specifically,

- Explore phone vendor procurement options
- Acquire, develop and use data analytic tools to better manage and forecast staffing levels
- Standardize our interactions with customers across our call centers
- Enhance our internet site with tools, videos, notifications, etc.
- Standardize and implement consistent metrics
- Enhance and deploy quality assurance tools
- Improve our customer service survey and use it to inform our services
- Develop a plan to address surge events
- Train staff for planned and unexpected high-call volume events

Phase 2. 2025-27

- Phase 2 will focus on tools and technology improvements. Specifically, virtual agent, web chat, restructured call tree, process automation, call scheduling, call back, and other improvements. We will work with the phone vendor to develop cost estimates. Estimates are between \$3.2 to \$6.1 million based on the EY report and estimates from our current phone vendor.

Phase 1 Investment Needs

To fulfill the ongoing needs of the Center of Excellence, the following permanent positions are needed beginning with the 2023-25 biennium.

| Position | Functions |
|--|--|
| Customer Experience Director (Revenue Manager 2) | <p>Manages operations of Center of Excellence.</p> <p>Evaluates programs, services, systems and program effectiveness through analysis of performance data and coordination with Customer Experience Strategist.</p> <p>Leads the development of call center policy, procedure and other documentation for use by call center team members.</p> <p>Establishes and coordinates continuous improvement training program for call centers.</p> |
| Customer Experience Strategist (Operations & Policy Analyst 4) | <p>Serves as project manager for the customer experience portfolio of projects.</p> <p>Develops reporting tools used by Center of Excellence and call centers to track and monitor performance measures.</p> <p>Uses workforce management tool to plan and prepare for surge events and to plan for resource needs for peak volumes for specific business lines.</p> |

The total costs for the two positions for the next two biennia are shown below:

| Phase | Biennium | General Fund | Other Funds | Total |
|---------|----------|--------------|-------------|-----------|
| Phase 1 | 2023-25 | \$391,865 | \$145,219 | \$537,084 |
| Phase 2 | 2025-27 | \$391,865 | \$145,219 | \$537,084 |

As the need for additional staffing increases during the 2023-25 biennium, we will use limited duration or job rotations to address staffing needs. We will identify additional position needs and technology costs as we prepare the agency's recommended budget for 2025-27.

These investments will position us to better meet future demands, implement consistency throughout our call centers, and better serve Oregonians.