Collaboration in Creating a State-of-the-Art Call Center

Julie Magee, Alabama Department of Revenue
Tim Shields, SourceHOV
August 10, 2016

1

Outline

- Introductions

- Overview

- Session Key Points

Background

- History

- Challenges

- Internal Approach

Revised Approach

▸ Evaluated Outsourcing Call Center

▸ Studied Industry Standards and Best Practices
  ◦ Answer times
  ◦ Hold times
  ◦ Average call times

▸ Issued RFP

Procurement

- Issued RFP with strong requirements
  - Service level agreements for call times, hold times, etc.

- Required facility to be in the state of Alabama

- Required strong tax knowledge and experience

- Required strong security–SSAE–16 Type II, IRS 1075, NIST 800–53

Implementation

- Contract awarded in January 2016

- Goal was to implement prior to peak calls in April

- Initial approach was to utilize vendor software and platform

Collaboration

- After initial discussions with DOR, SourceHOV, and the State technology agency-Information Services Division (ISD) it was determined ramp up time to integrate and implement technology would be 3-6 months
- Due to an integrated environment and infrastructure already in place with SourceHOV, DOR, and ISD, a strategic decision was made to utilize the DOR and ISD platform

Collaboration

- Utilized the existing ISD infrastructure:
  - Digium Switchvox 6.0 software
  - Digium D4 and D70 VOIP phones
- With existing platform in place the technology side was very easy to build upon
- DOR and SourceHOV worked closely to create the appropriate scripts for each aspect of anticipated calls
- Due to this partnership able to go live in March 2016

Types of Calls Being Answered

Call Type	%
Title	3%
Fraud Quiz	4%
Motor Vehicle Transfers	4%
Income Tax Transfers	5%
Motor Vehicle–Mandatory Liability Insurance (MLI)	32%
Refund	52%
Total Calls	100%

Note: Percentages based on calls from April 1 – May 15, 2016

Results

Performance Category	Service Level Agreement (SLA) Metrics	Actual Results	SLA Fees
Service Level (average time to answer calls)	75.00% calls answered within 20 seconds	81.71%	If less than 74.99%, then 20% of Monthly CSR Expense
Abandoned Calls	5% total calls abandoned after 8 seconds during measurement period	0.79%	$0.00
Average Call Time (Minutes/Seconds)	N/A	3:01	N/A

Next Steps

▸ The initial phase of the project has successfully been completed and we are now expanding to have remaining income tax related calls transferred and additional motor vehicle calls transferred.

▸ Additional components we are in the process of adding or improving upon include:
  ◦ Live Chat
  ◦ Email traffic
  ◦ Improved web site
  ◦ Leveraging social media

Key Points Recap

- **Improved customer service/increased productivity**
  - Taxpayers serviced faster–calls answered in 20 sec. or less
  - Taxpayers have no wait–no longer hang up in frustration
  - DOR able to focus on core business/more complex tax issues
- **Value of partnerships**
  - Leveraging expertise of business partners and having clear and meaningful metrics in the SLA's produces positive results
- **Improved call center metrics**
  - We know have measureable results and we can see the quality of service being provided to taxpayers with daily reporting
  - Calls are answered in 20 seconds or less, abandoned calls is less than 1%, emphasis is on resolving the taxpayer issue in the first call to avoid callbacks, and average call time is 3 minutes

Questions

Thank You

Julie Magee, Commissioner
Alabama Department of Revenue
Julie.Magee@revenue.alabama.gov
334.242.1175

Tim Shields, Account Manager
SourceHOV
Tim.Shields@SourceHOV.com
404.330.2062