



Using Virtual Representatives in a Revenue Agency

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Agenda

- Why CRM?
- What is a Virtual Representative?
- CRM Technologies and the vRep
- Case for the vRep
- Implementation Considerations
- Demonstration

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Definition of CRM

Customer Relationship Management is a capability that allows government to dramatically improve its relationship with its customers through re-organizing services around customer intentions.

It allows agencies to create an integrated view of the customer and use this information to coordinate services across multiple channels.



What is a Virtual Representative?

- Virtual representatives are online agents that mimic real customer service representatives.
 - A CRM Technology
 - Text messaging (chat-like) user interface
 - “Natural language” dialogue with the customer



Online Customer Service Challenges

- Online usage continues to grow
- Increased expectations for online service
- Lack of tools to respond to online requests
- High cost of serving online service requests
- Text messaging support requires new skill sets
- Tax sites hold a large amount of disparate information, complicating site navigation



Web Self Service Strategy

Search

Live Rep

Database

FAQs



- T
- R
- U

vRep Engages a Search Engine
e.g. Inktomi Search

- How do I contact an assessor?
- I want to complete
- I forgot to pay my taxes.

Live Rep

- W
- I
- C

vRep Initiates Database Lookup

- ~~Can I still get a refund?~~
- Where can I get tax forms?
- What is my property tax rate?

FAQs



The Case for the vRep

- Reduces incoming phone calls and emails
- vReps provide consistent service at a lower cost
- Low cost implementation (\$150K - \$250K)
- Typical return on investment (ROI) is between 12 to 18 months
- Low risk implementation
- Short implementation period (10 – 16 weeks)
- Very few web-site changes are required



Possible Applications within Revenue

- Content presentation
- Refund status inquiry
- Business closure
- \$0 sales tax return filing
- Return preparation help
- Not ideal for form capture



vRep Implementation Considerations

- Determine requirements (Job Description) early
 - Reason your organization being contacted
 - Information requests, account-specific requests, and transaction processing
 - Willingness to integrate
 - Release approach
- Build your subject list and make it accessible
- Consider your escalation technique(s)
 - Search
 - Database integration
 - Online chat
 - eMail
 - Phone call



vRep Implementation Considerations

- Plan to monitor the vRep
 - Reporting capabilities for ongoing improvement
 - Tracking the conversation as a “contact”/channel
- Testing is critical
- Consider “personalization”. What is the customer interested in?



Sample Virtual Representative

vReps can be opened as "child" windows, or can be imbedded in your web-pages.

vReps can be hosted separately from your existing pages.

One vRep can support multiple web-sites.

