



Customer Service Improvement Project

Michigan Treasury  accenture Team

Providing tools for superior customer service

Customer Service Improvement Program
(CSIP)
Presentation -- August 11, 2002



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AGENDA

- CSIP Team
- Project Background
- Demonstration
- Conclusions
- Discussion



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Project Team

- Julie Croll - Project Sponsor
- Nancy Taylor - Project Champion
- June Summers Haas - Project Champion
- Stephen Hilker - Customer Service Director
- David Borzenski - Contract Administrator
- David Gilliland - Project Manager
- Roger Dooley - Accenture Project Director
- Rick Windham - Accenture Project Manager
- Heather Pacini - Accenture Consultant/Training Lead
- Sandra Engle - Maximus Quality Assurance
- Leigh Ann Miller - Siebel Technical Account Manager



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Project Background - Business Process Re-Engineering

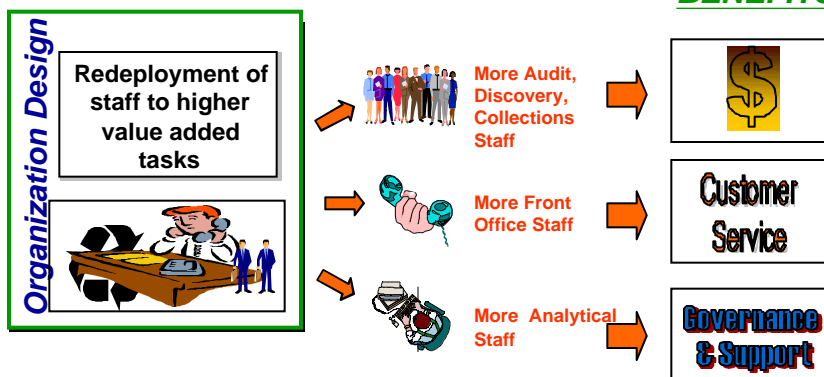
- Business Process Re-Engineering Study
 - Deloitte Consulting - October 1999 – July 2000
 - Product/Integrator Selection – July 2000 – September 2001
- Problems – Key Weaknesses
 1. Significant customer service time spent on status related queries
 2. Excessive busy signals in the Individual Income Tax call center
 3. Long turnaround times for answering inbound correspondence
 4. Limited and inconsistently used channels of communication with customers
 5. Low resolution percentage on customer problems on the first contact with Treasury
 6. Little data collected on customer problems or issues
 7. Little data collected and reported on Treasury customer service effectiveness



Project Background Business Objective – A focused Organization

Resource Shifts and Cost Savings

BENEFITS



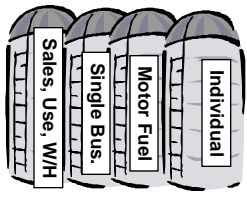


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Project Background

Business Objective – A focused Organization

Siloed Information to Specialization



Tax Operations in Silos



Tax Processing



Customer Service



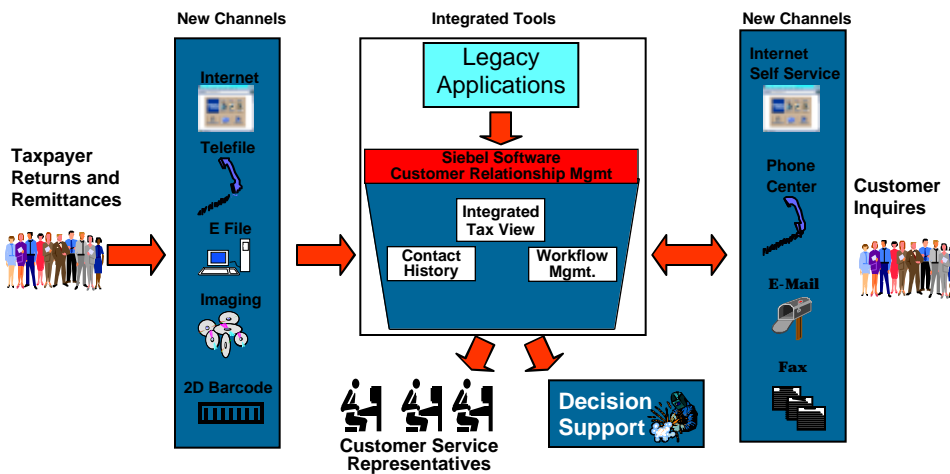
Tax Enforcement



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Project Background

Business Objective- Improve Customer Service



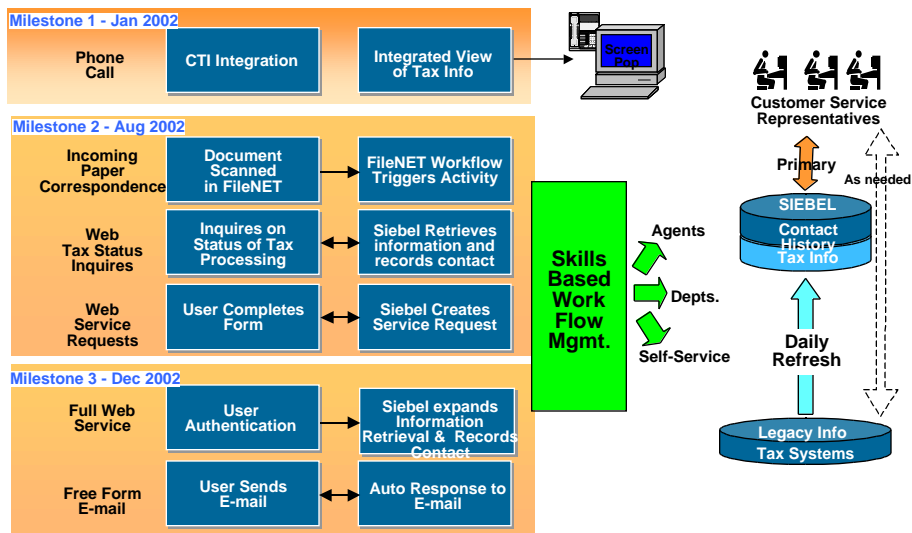


Project Background – Best Practices Approach

- Implement Commercial Off-The-Shelf Software
- Selected Siebel Customer Relation Management (CRM)
- Improved Procurement Process – Teamwork Period
- Incremental Roll-out of Functionality
- Integrated Team: Treasury, DIT, Accenture, Siebel, Maximus
- Accenture-Proven Commercial Best Practices
 - Government/Call Center Specialists
 - Accenture Government Solution Center – Reston, Virginia
 - Accenture on-going Maintenance & Support Team



Project Background – System Overview





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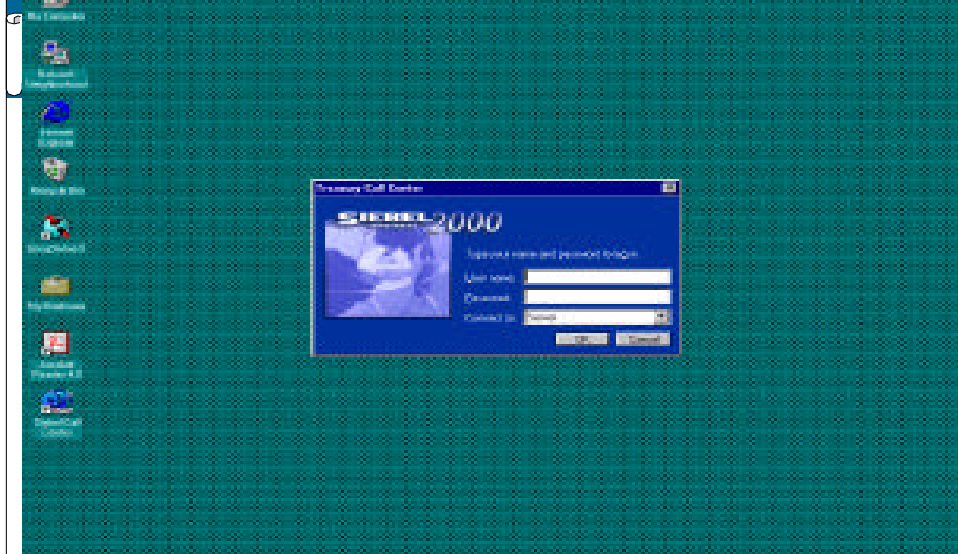
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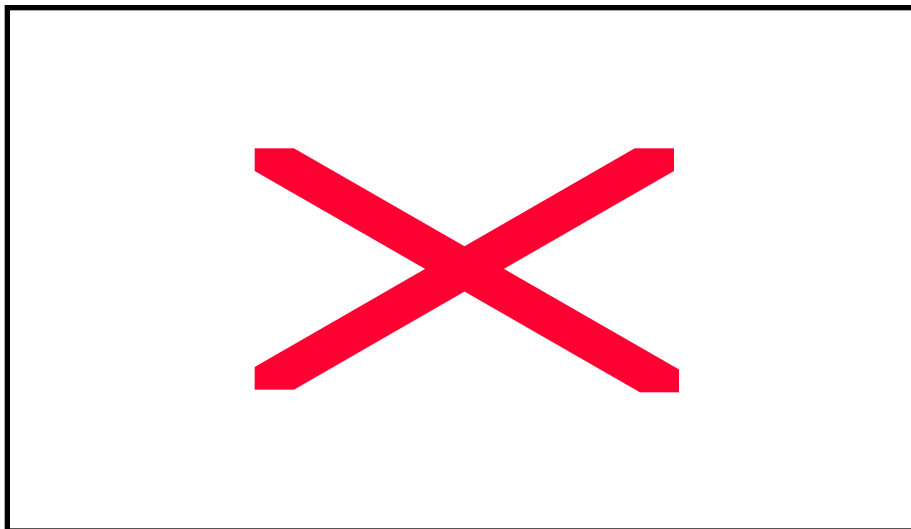
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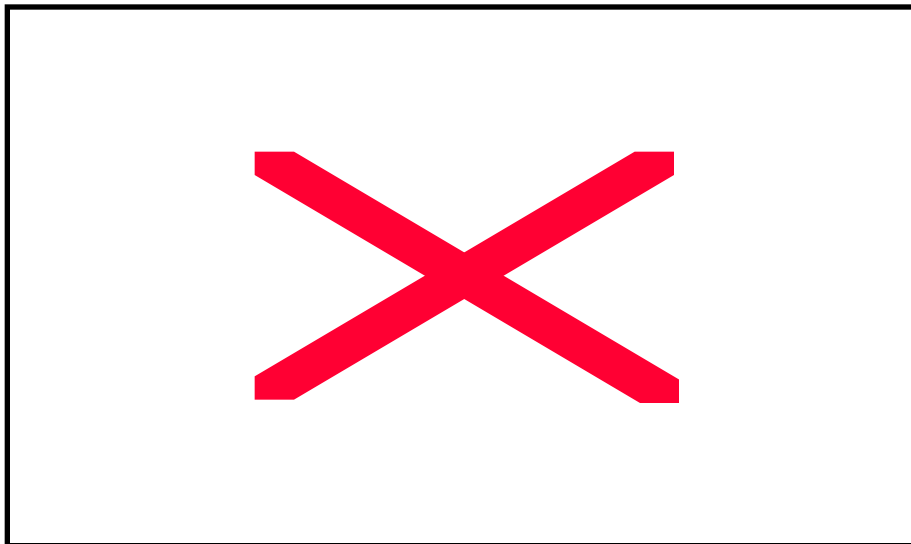
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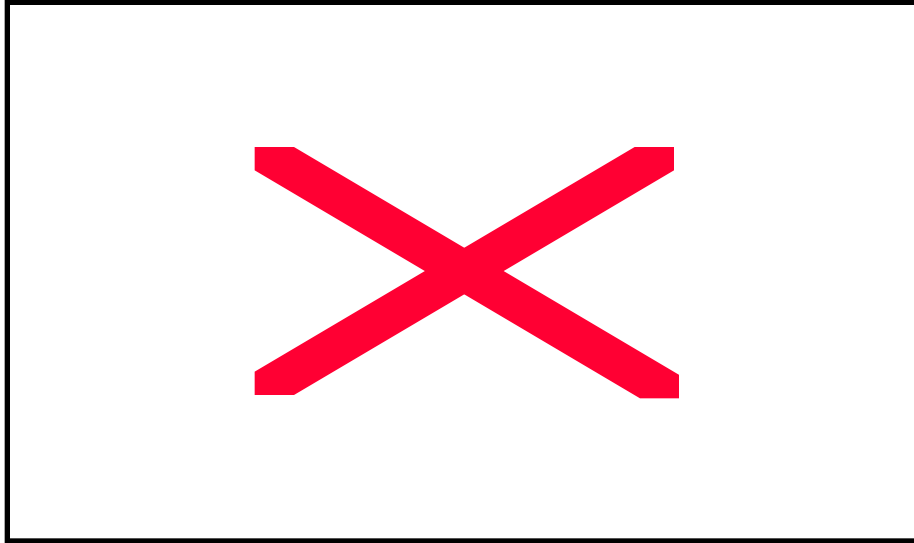
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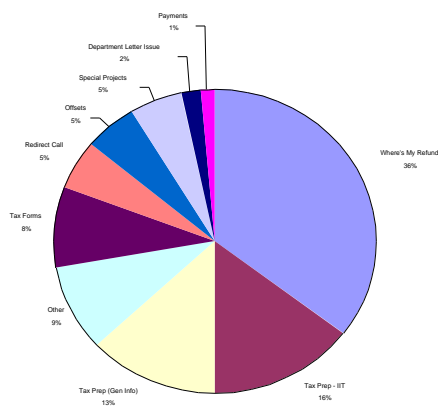
Milestone 1 Key Successes

- Rapid Implementation
 - CRM Pilot implemented 10 weeks after contract award
 - IIT and SBT Call Centers “Go Live” January 29
- Successful leading edge technology integration with MIPC and DMB Telecom
- Knowledge Transfer
 - Treasury Trainers providing instruction for Treasury Staff
 - 80 Customer Service Representatives trained and use CRM daily
 - Systems operations now performed by Treasury staff
- Performance data available to Treasury Management

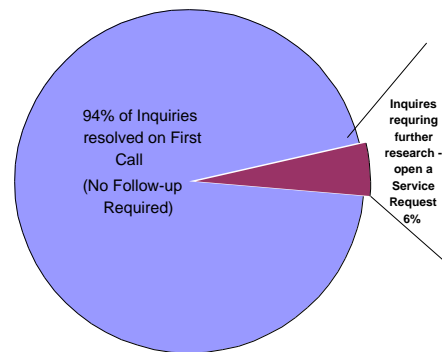


Milestone 1 Key Metrics – Individual Taxpayers

IIT Call Reasons - February, 2002



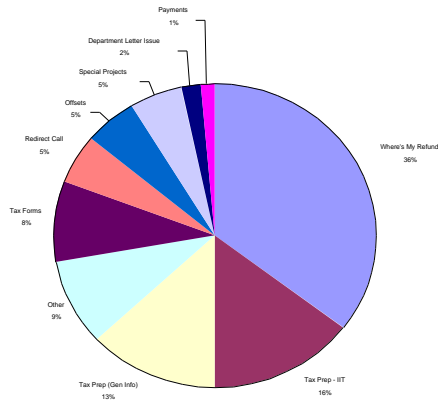
Contacts with Service Requests



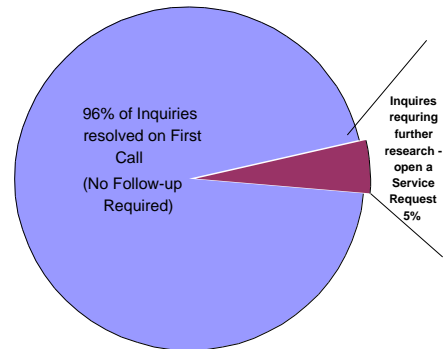


Milestone 1 Key Metrics – Business Taxpayers

IIT Call Reasons - February, 2002



Contacts with Service Requests



Project Objectives *“When all is said and done”*

- | | |
|--|---|
| <ul style="list-style-type: none"> • Problems – Key Weaknesses <ul style="list-style-type: none"> - Significant customer service time spent on status related queries - Excessive busy signals in the Individual Income Tax call center - Long turnaround times for answering inbound correspondence - Limited and inconsistently used channels of communication with customers - Low resolution percentage on customer problems on the first contact with Treasury - Little data collected on customer problems or issues - Little data collected and reported on Treasury customer service Effectiveness | <ul style="list-style-type: none"> • Solutions – Project Objectives <ul style="list-style-type: none"> - Establish self-help channels - Internet & IVR - Reduce call volume by making back-end changes - Push tier 1 calls to self-service - focus on tier 2 calls - Match customer with most appropriate skilled agent - Scan correspondence and automate workflow - Establish metrics of queue lengths - Establish Internet and email - Develop a world-class center with multi-skilled agents - Match customer problems with appropriate agent - Consolidate customer information - Collect information for metrics database - Create management reports from metrics database - Monitor CSR quality |
|--|---|



The Future

- CRM System applicable to other State agencies
 - Retirement
 - Accenture functional assessment in progress
 - Community Health
 - Unemployment Assistance
 - Others
 - eMichigan, Family Independence Agency, State Police,
 - Elections Division, Secretary of State, Lottery,
 - Consumer and Industry Services
- Project Methodology applicable to other State agencies
 - Technology Integration can be leveraged
 - Knowledgeable resources in DIT, MIPC & Telecom
 - Solid Process for rapid implementation
 - Treasury CRM design can be leveraged



Questions

