

Customer Relations Management

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What is Customer Relationship Management (CRM)?

- **Customer relationship management (CRM)** is a multifaceted process, mediated by a set of information technologies, that focuses on creating two-way exchanges with customers so that firms have an intimate knowledge of their needs, wants, and buying patterns. In this way, CRM helps companies understand, as well as anticipate, the needs of current and potential customers

Moving to an Integrated Tax System

How Did We Get There?

West Virginia

- Outdated legacy systems and manual processes
- July 2002 – Work Group
- 2003 – Benefits Funding Statutory Authorization – expired June 2005
- January 2005 – Direct appropriation to replace remittance processing and data capture system
- July 2005 – Direct Appropriation provided for integrated tax system
- December 2005 – Integrated Remittance Processing/Data Capture System in production
- February 2006 – RAPIDS Project started to install Integrated Tax System

Montana

- 2003 legislative mandate to replace our legacy systems
- Phased in the new system to process all department taxes

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Moving to an Integrated Tax System

What Does Our System Include?

West Virginia

- Integrated Remittance Processing/Data Capture System
 - High speed imaging of all tax returns/checks
 - Automated data capture
- Integrated Tax System
 - 37 taxes
 - All tax processes
 - New System Hardware

Montana

- Our Integrated Revenue Information System (IRIS) now includes all of the department's 30 taxes and fees including:
 - Unclaimed Property
 - Liquor Warehouse Management
 - Liquor Licensing
 - Alcohol Beverage Taxes
 - Video Gaming Tax (Department of Justice)



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Moving to an Integrated Tax System

What are the Benefits of an Integrated System?

West Virginia Montana

- Benefits to the State
 - All employees have access to a consolidated view of taxpayer information across all taxes and activities for better service
 - Field audit data available to all staff
 - Collection case data available to all staff
 - Shared customer relations notes for better communications within Department
- Benefits to the State
 - Call Center:
 - Call Center staff works in one system to answer taxpayers' questions about their accounts
 - Auditing:
 - Auditors can see taxpayer data across account types to identify non-compliance
 - Auditors can quickly access other data sources

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Moving to an Integrated Tax System

What are the Benefits of an Integrated System?

West Virginia Montana

- Benefits to the State
 - Collectors spend more time in field – stand alone version of system available on notebooks
 - Field auditors have access to all system financial data in standalone audit mode
 - All correspondence available within system
- Benefits to the State
 - Collections:
 - Collectors can review all of a taxpayer's accounts
 - Collectors can offset credits to pay debts
 - Financial information is available for collectors when making payment plans

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Moving to an Integrated Tax System

What are the Benefits of an Integrated System?

- | West Virginia | Montana |
|--|---|
| <ul style="list-style-type: none">• Benefits to the State<ul style="list-style-type: none">➢ Managers have tools and information to actually manage workflow and processing➢ Fully automated refund process has decreased time to produce a refund➢ Monthly Statements of Account have increased collections | <ul style="list-style-type: none">• Benefits to the State<ul style="list-style-type: none">➢ Liquor Licensing:<ul style="list-style-type: none">• Liquor compliance specialists are no longer consumed by manual paperwork• Liquor compliance specialists gain workflow efficiency by scanning essential documents needed by both Liquor and Gambling at the same time |

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Moving to an Integrated Tax System

What are the Benefits of an Integrated System?

- | West Virginia | Montana |
|--|---|
| <ul style="list-style-type: none">• Benefits to the Taxpayer<ul style="list-style-type: none">➢ Improved remittance processing/data capture processes have expedited the deposit of funds and availability of tax return data allowing for quicker communication with taxpayers➢ Standardization of process across taxes assures similar treatment of taxpayers | <ul style="list-style-type: none">• Benefits to Taxpayers<ul style="list-style-type: none">➢ Each taxpayer has one account ID to remember➢ Taxpayers receive faster responses when asking questions regarding their different accounts |

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Moving to an Integrated Tax System

What are the Benefits of an Integrated West Virginia System? Montana

- Benefits to Taxpayers
 - Simplified tax forms
 - Combined Forms
 - Sales, Use and Municipal Taxes
 - Income/Franchise for Pass Through Entities
- Benefits to Taxpayers
 - Taxpayers have one point of contact for resolving issues regarding multiple accounts.
 - Taxpayers can transfer credit balances from one account to pay an outstanding liability on another account.

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Moving to an Integrated Tax System

What are the Benefits of an Integrated West Virginia System? Montana

- Benefits to Taxpayers
 - Plain English correspondence
 - Specialized notices (message blocks on returns) and letters allow us to communicate important issues quickly
 - Time to notify taxpayer of changes/liabilities decreased
 - Accuracy of billings increased
 - System changes easier to make
- Benefits to Taxpayers
 - Faster approval of Off Premises Beer and Wine Liquor License applications.

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Making Compliance with Tax Laws Easier for Taxpayers

Online Payment and Filing Options

West Virginia

- 2002 – Began offering online payment services for limited tax types

Montana

- 2001 – Began offering online payment services
 - Income Tax Express – offers electronic payment options for individual income taxes
 - Business Tax Express – offers electronic payment options for withholding tax and electronic payment and filing options for lodging facilities tax and rental vehicle tax

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Making Compliance with Tax Laws Easier for Taxpayers

Taxpayer Management of Their Own Accounts

West Virginia

- Currently implementing MyTaxes
- View tax return data for 3 years
- File original and amended returns
- Pay current and past account balances by ACH Debit or credit card
- Change name
- Change addresses
- Store returns for later completion and submission
- Schedule payments for future dates



Montana

- 2006 - Taxpayer Access Point (TAP) was added to our website
 - A free service that allows taxpayers to:
 - manage their account, or
 - in some cases file a return electronically

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Making Compliance with Tax Laws Easier for Taxpayers

What Tax Accounts Can Be Managed?

West Virginia

- As of May 2008, through MyTaxes business have access to:
 - Business & Occupation Tax
 - Business Registration Renewals
 - Cemetery Company Registration and Reporting
 - Direct Pay Permit Return
 - Special District Excise Tax
 - Factory Built Home Fees
 - Fiduciary Income Tax
 - Sparklers and Novelties Renewals
 - Use Tax
 - Wine & Liquor Tax
 - Withholding Tax

Montana

- 2006
 - Beer and Hard Cider Tax
- December 2007
 - Wine Tax
 - Emergency Telephone (911) Service Fee
 - Retail Telecommunication Excise Tax
 - Telecommunications (TDD) Service Fee

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Making Compliance with Tax Laws Easier for Taxpayers

What Tax Accounts Can Be Managed?

West Virginia

- July 2008:
 - New Combined Sales and Use Tax that also includes Municipal Sales and Use Tax
- October 2008:
 - Severance Tax
 - Coal Severance Tax
 - Timber Severance Tax
 - Additional Severance Tax
 - Solid Waste Assessment
 - Telecommunications Tax
 - Health Care Provider Tax

Montana

- June 2008:
 - Taxpayer registration functionality for businesses
 - Liquor Retailer Account
 - Liquor Vendor Account
 - Hospital Utilization Fee
 - Nursing Facility Bed Tax
 - Consumer Counsel Fee
 - Electrical Energy Excise Tax
 - Wholesale Energy Transaction Tax
 - Public Service Regulation Fee
 - Winery Registration Renewal Fee
 - Vendor Registration Renewal Fee

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What's Next?

West Virginia

- August 2009:
 - Motor Fuels Excise Tax
 - Motor Carrier Road Tax
 - Non-intoxicating Beer Barrel Tax
 - Soft Drinks Excise Tax
 - Wine Liter Tax
 - Tobacco Products Tax
 - Charitable Bingo licensing and reporting
 - Charitable Raffle licensing and reporting

Montana

- December 2008 – July 2009:
 - Remaining taxes and fees will be added to TAP as applicable.

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What else is next?

- Commitment to improving customer service
- Continual self analysis
- Commitment to simplification and improved communication

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Growing Pains

- Education of Stakeholders
- Change in Business Processes

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Customer Relations Management



West Virginia
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