

NCDOR

**NORTH
CAROLINA
DEPARTMENT
OF REVENUE**

**Effective Customer
Interactions**

2016

Agenda

- **Introduction**
- **Define Blue Chip Service**
- **Managing Taxpayer Contacts**
- **Enhanced collection techniques**

Tax collector VACATION

- Go Anywhere
- No Restrictions
- Do Anything
- Have FUN!!



Blue Chip Service Characteristics

- No Worries
- Never Heard No
- No Waiting
- Anticipated Needs
- Customized Choices
- Personalized
- Knowledgeable Friendly Staff



Managing Taxpayer Interactions

- **Build Trust**

1. Show Empathy by Acknowledge Taxpayer's Concern, if needed
2. Offer to Help Statement

- **Get to Heart of Call**

3. Ask Identifying, Open, and Confirming Questions

- **The Solution**

4. Provide the Solution with Choices
5. Gain Cooperation

- **Conclusion**

6. Recap and Provide What's Next
7. Ask "Is there anything else?"

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Build trust

- Standard Opening
 - Good Afternoon, this is the North Carolina Department of Revenue, my name is Charlie Helms, How may I assist you today?
- Show Empathy
 - Listen to taxpayer
 - Reflect understanding

Show Empathy by Acknowledging Concern

*To Build Trust with a Taxpayer, show empathy by acknowledging his or her concern, if needed. It tells the Taxpayer **you understand** how he/she has been impacted by the situation. **Because they don't care how much you know, until they know how much you care.***



https://www.youtube.com/watch?v=dMqGr4A_0E0

Build Trust

- Offer Statement to Help
 - Summarize the problem: Okay, so the Department sent you a bill showing that you owe a large tax liability. You don't think that you owe it. Even if you did, you can't afford to pay it.
 - Yes, I can assist you with that!

Offer to Help Statement

I Can Help

*Use an Offer to Help statement at the beginning of each call to let the Taxpayer know that **you will take accountability to help him/her.***

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Identifying, Open, and Confirming

*To Get to the Heart of the Call, it is important to give the Taxpayer **the explanation** for your questions first (the benefit), then ask **Identifying, Open, and Confirming** questions.*



Heart of The Call

- Ask Identifying, Open, and Confirming Questions
 - To validate your identity and protect your privacy I need to ask you a few questions
 - Can you provide me with your name, address and SSN?
 - To determine if the liability is due, I must ask a few questions ...
 - When did you acquire the property?
 - When did you receive the notice of tax due?
 - Has your address changed?
 - <https://www.youtube.com/watch?v=ZIOogEaO3Hc>

Heart of the Call

- Confirming questions
 - Okay so you acquired the lot before 2013
 - You don't believe you received our notice
 - But you haven't change your address in 20 years

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PROVIDE SOLUTION with Choices



Providing a Solution with Choices allows the Taxpayer to feel in control and makes the solution a little more acceptable.

The Solution

- Provide the Solutions with Choices
 - Since you acquired the property prior to 2014, the tax is due
 - Based on the dates of the notices and the fact you haven't changed your address, the billing has become final
 - You may pay in our office with cash, by mail with a check or over the phone or website with a Visa or MasterCard ... How would you prefer to handle this?
- <https://www.youtube.com/watch?v=EUm-vAOmV1o>

The Solutions

- Gain cooperation
 - Great, so you would like to pay with credit card over the phone ...
 - Oh no, I can't afford this at all...
- Sometimes you may have to move back a step

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Heart of the Call

- So, you don't have the ability to pay in full today ...
 - Always assume payment-in-full
 - Provide payment options
 - Do you have a major credit card?
 - Are you a member of a credit union?
 - If you can't pay in full, how much are you short?
 - Better than “how much can you pay”
 - Assumes payment in full
 - Allows you to retain control of the negotiation
 - Depending on policies, offer options such as penalty waiver, payment plans or settlement agreements

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Gain Cooperation

*Gaining Cooperation is asking the Taxpayer **which Choice would he/she prefer.***

Simply Ask
“Which would you prefer?”

The Solutions

- Options
 - You may pay today using cash, check or credit card ... which would you prefer?
 - If you decide not pay today, penalty and interest will continue to accrue and your assets, such as your wages and bank accounts may be attached and garnished and liens issued against your property
 - Hey, it is a choice and should be presented as a choice
- Gain cooperation
 - Okay, so you've decided to visit our Kiosk at Wal-Mart to pay via credit card.
 - <https://youtu.be/4T2GmGSNvaM>

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Recap and Provide What's Next



*Recapping and Providing What's Next is **reconfirming** what has been discussed and **states** to the Taxpayer the **expected outcome and what will happen next** regarding the actions he/she will need to take.*

Conclusion

- Recap and Provide What's Next
 - Thank you for agreeing to pay using your MasterCard at the Wal-Mart kiosk
 - It is located at the front of the store between Great Clips and the EyeWear store
 - You must pay \$1,021.56 prior to May 1, 2016 to avoid additional penalty, interest and potential enforced collection actions
 - The lien against your property will be released with the Wake Co. Clerk of Court upon posting of payment in full and you will receive a copy of the release

Ask, “Is There Anything Else?”



*Asking, “Is There Anything Else?” ends the interaction on a **positive and professional** note and ensures the Taxpayer’s questions and concerns have been addressed.*

Conclusion

- Ask if there is anything else
 - Is there anything else I can assist you with today?
- End call
 - Thank you for your call and please contact us again anytime we can be of service
 - Normally, the taxpayer ends the call before the call agent disconnects

GENERAL CONTACT HANDLING TIPS

Protect Internal Processes

*Protecting Internal Processes is building a sense of **trust and confidence** with Taxpayers by not revealing county's procedures, processes, and **issues to Taxpayers.***

Handling Abusive Taxpayers

1. **Offer to Help:** you are a professional that is here to help, but they need to act professional as well.
2. **Consequences of Their Behavior:** if he/she continues to swear at you and act unprofessional, you will need to end the call.
3. **Hang Up The Call:** you are ending the call now and he/she is welcome to call back at a better time.

Public \neq Public
Servant Doormat 

State Information Positively



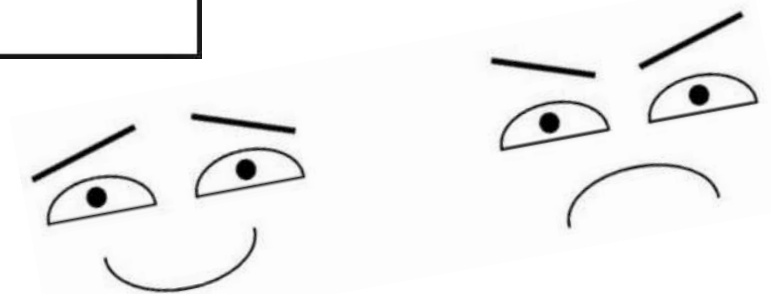
Stating Information Positively helps build the Taxpayer's confidence in your knowledge and abilities. It puts the situation or issue in a positive light.

Add Value

*Add Value to the Taxpayer experience at every opportunity during the interaction. It conveys to the Taxpayer **we are focused on their needs, we are here to help, and their tax dollars are hard at work!***



Vocal Tone, Jargon & Acronyms



Perception = Reality

Activity

- Listen to two customer service videos and jot down what you like and dislike about each customer service interaction.
- Video 1
<https://www.youtube.com/watch?v=y5UVy-uCUzs>
- Video 2
<https://www.youtube.com/watch?v=qKv2HG suaUs>

Score Carding – Attain Standards

*Standards are the **minimum level of acceptable performance.** These are the objective measurements on the evaluation scorecard.*

Summary

- Protect Internal Processes
- Attain Standards
- Achieve Blue Chip
- Manage Taxpayer Interactions
- Personalize the Solution with Options
- State Information Positively
- Add Value

[View this movie.](#) Enjoy!

Local Government Collection Topics

- 105-242: Teeth for non-responsive garnishees
 - 105-368(d) still requires a court action to transfer responsibility to non-responsive garnishees
- FIRM and other data State sources
 - 105-242 (b) includes FIRM legislation
- State Vendor Offset Program
 - Page 131 – 2010 HB879

Questions



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