



# Enhancing Online Customer Experience Through Data

2025 CPM CLASS SUBMISSION

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SOUTH CAROLINA DEPARTMENT OF REVENUE

# Introduction

The South Carolina Department of Revenue's four guiding strategic goals are: 1. Increase tax and regulatory compliance; 2. Ensure a secure environment; 3. Provide a customer-centric experience; 4. Engage and empower employees. (Who We Are, 2025 )

In support of goals 1 and 3, we provide online self-service options for our customers—primarily through our website and our taxpayer portal. Our public website, [dor.sc.gov](http://dor.sc.gov), is an informational resource to help our customers understand their compliance requirements. Our taxpayer portal, MyDORWAY, is where taxpayers complete tasks to meet those requirements, including submitting applications, returns, and payments.

In my role as Director of Strategic Communications in the SCDOR's Communications & Strategic Solutions Division, my team and I partner closely with the team responsible for MyDORWAY. We work together to ensure MyDORWAY processes meet our brand standards, are written in easy-to-understand language, follow a logical flow, and generally create a positive user experience. My team is also responsible for the design, content, and structure of our website.

As an agency, we make frequent updates to these online service options in hopes of improving them for our customers and supporting our agency goals. The work undertaken for these improvements is significant: The team responsible for MyDORWAY completed an average of 95 annual updates to the portal over the past three years, and there are four initiatives on our fiscal year 2025 strategic plan related to either the website or MyDORWAY, including launch of a brand-new website.

These online services are impactful, accounting for most customer interactions. MyDORWAY is used by over 380,000 customers, and dor.sc.gov has over 2 million annual unique users.

According to a survey conducted in spring 2024 by the Winthrop University Center for Public Opinion and Policy Research, “Most interact with the department online, either via dor.sc.gov or MyDORWAY.” Of the 183 survey respondents who interacted with our agency, 108 or 60% did so online. The Winthrop Center continues, “Based on this information and the suggestions given by survey respondents, the SCDOR could focus on making sure online resources are easily available and run smoothly so that service is quick and efficient and so the SCDOR continues to be a helpful and positively-viewed service for South Carolinians.” (McMillan, 2024)

Despite this work effort, organizational commitment, and customer impact, we do not have a comprehensive or strategic process for evaluating whether these updates are successful in moving us toward our goals. Though we have evaluation processes for person-to-person interactions (walk-ins and phone calls), we do not have a strategy for evaluating our online services. We cannot determine whether we are meeting the goal of providing a customer-centric experience without evaluating our online service options.

## Problem Statement

We made progress toward evaluating our online services in 2023 and 2024 by creating more sources of data and implementing several new analytics features that measure performance on MyDORWAY. But we do not yet have a structure around analyzing the collected data. There is no clear responsibility or process for reviewing the data, nor are there standards around what results are acceptable or require intervention. Because we do not have a strategy in place to

evaluate the customer experience of our online services, we need to develop that process to ensure we are providing a positive online experience to our customers.

In this project, I will develop recommendations for evaluating the customer experience data available to us about our online taxpayer portal, MyDORWAY. I hope that the recommended strategy developed through this project can then be adapted for our new website.

## Data Collection

My main goal in data collection was to learn what is already available that we can build from—what data is readily accessible for us to begin analyzing, and what successful processes peer agencies use in analyzing the data that they collect.

I focused my research on “online customer service options” which, for our peer agencies, are primarily online taxpayer portals where customers can complete transactions. For other non-tax peer agencies, these also include websites, searchable databases, and other self-service portals.

## Best practices and case studies

To find an evaluation method that could work for the SCDOR, I wanted to learn what others were doing and what was working well for them. I conducted surveys, interviews, and industry research to determine best practices for evaluating customer experience.

I created and sent an online survey to other South Carolina state agencies, other state departments of revenue, and other agencies who contract with FAST (the vendor we use for MyDORWAY) by posting to forums and directly emailing contacts. The survey sought to capture how each agency collects and analyzes data on their online customer experiences, asking questions about:

- what data they collect
- who has access to the data and what expectations are in place for monitoring it
- who makes decisions based on the collected data

I received responses from 22 individuals who represented 21 agencies. Of the responding agencies, seven (33%) were other South Carolina state or municipal agencies, and 14 (66%) were other state tax agencies or FAST clients. (Appendix 1) I conducted email or video follow-up interviews with the respondents from the Iowa and Oregon departments of revenue to learn more about their answers.

I also gathered examples and case studies of agencies who overcame problems similar to ours by searching the National Association of State Chief Information Officers (NASCIO) database of State IT Recognition Award submissions.

## Analytics

As additional background, I needed to understand what performance metrics and data are available to be analyzed. I explored DORWAY, the employee-facing part of the MyDORWAY portal, to determine what dashboards and reports are accessible and what data each includes.

Those I identified as most applicable to this project and with the most ready-to-use data are:

- E-Services Dashboard: Captures activity on MyDORWAY. Includes totals for number of sessions, web requests submitted, new accounts created, and correspondence sent.
- Submission Statistics: Captures data on specific customer interactions, or “submissions,” on MyDORWAY. For each type of submission, includes number started, number saved,

number completed, abandonment rate, average time spent, and at what point the submission was abandoned.

- **Submission Feedback:** Provides results of feedback survey provided at the end of a submission. For each type of submission, includes rating breakdown, average rating, and individual comments. This feature has been turned on for five submission types: Business Tax Registration, Payment Plan Request, Quick Payments, Sign Up for MyDORWAY, Withholding Return.
- **Assistant Dashboard:** Displays statistics for the assistant, which is the chatbot we call Dorwin. Includes number of inquiries, breakdown and feedback, and most-accessed information.

## Data Analysis

### Survey analysis

Many of the agencies who responded to the survey are in a similar position as us—all collected some form of data on their online customer experience, but only 52% have an individual or team assigned to analyzing the collected data. Only two respondents said that their agency's content experts have access to and are expected to monitor their data, but 13 identified their program area or leadership as responsible for making decisions based on collected data.

(Appendix 1)

Responses generally reflected a trend of having data available, but not having an organized evaluation process. One respondent shared over email that they don't collect much information

because previously they “collected feedback from customers about the online renewal process, but when the information was made available no one wanted it.” (SCLLR, 2024)

In analyzing the results, the Iowa, Oregon, Utah, and Finland tax agencies stood out—they specifically mentioned units dedicated to customer experience or customer understanding.

While other agencies do analyze their customer experience data, no others mentioned a specific team dedicated to customer experience or appear to have as streamlined of a system for analyzing their collected data.

### Case studies: Other Departments of Revenue – Iowa and Oregon

After surveying peer agencies, I asked follow-up questions to two agencies whose responses reflected a successful system for centralizing their customer experience efforts—Iowa DOR’s Customer Experience Bureau and Oregon DOR’s Customer Experience Center of Excellence.

Oregon DOR’s Customer Experience Center of Excellence (CxCOE) mainly focuses on contact centers, but they note that their work benefits other areas of the agency as well. According to the CxCOE director, their ultimate goal is to “enhance the customers’ experience working with the agency.” They combine their expertise in customer service, contact centers, and technology to standardize and centralize customer experience while maintaining the individual needs of the different business areas. (Davis, 2025)

Iowa DOR’s Customer Experience Bureau combines several areas that have a customer impact: eServices, Communications, Organizational Change Management, Training, Forms & Correspondence. Previously, these areas were scattered throughout the agency, which led to unfocused work, overwork, and staff making decisions outside of their expertise. Since the

creation of the bureau, the Iowa DOR has received feedback from their taxpayers and legislators that they're happier with the agency overall. They credit the Customer Service Bureau with streamlining processes to prevent issues and errors, including making sure communications are properly reviewed and preventing the implementation of changes for one area that may negatively impact another area. (Pellington, 2024) Overall, they say "...we've seen higher engagement from our staff to follow the established processes, happier taxpayers because we're consistent in our answers, and increased voluntary compliance because we've made it easy to use and understand." (Appendix 1)

### Case study: SCDOR's MyDORWAY chatbot Dorwin

In 2019, our agency launched its first chatbot. This virtual assistant, named Dorwin, is connected to our taxpayer portal MyDORWAY. After many years of hard work and attention, Dorwin is widely considered a success both inside our agency and among our peers: Our Dorwin team leaders were asked to present on our success with the chatbot at a 2023 conference held by FAST (our MyDORWAY and Dorwin vendor).

To develop and launch the chatbot initially, we created an inter-departmental team that covered a variety of skills and knowledge. Participants included staff from: the development team responsible for the chatbot, who offered technical insight into how to create, edit, and publish the content; the different tax areas around the agency who had expertise in potential questions and their answers; and the Communications & Strategic Solutions (CSS) division, who offered quality control and wording expertise.

Since Dorwin's launch, a small team with that same basic structure has continued to oversee the chatbot. Team responsibilities include:

- Monitoring user feedback and usage statistics daily to make small adjustments to content or identify issues.
  - Example: When there is an uptick in questions about using two-factor authentication to log into MyDORWAY, the team contacts technical staff to confirm whether the systems that send out the two-factor authentication codes are working as expected.
- Reviewing data trends to identify content improvement projects.
  - Example: Over time, the team observed that because there is so much variety in the wording a user may choose to ask the same question, it was difficult for the chatbot to discern the most helpful answer for that customer. So, they reorganized Dorwin's structure to allow customers to click their way to a more specific answer, instead of relying on the text a user typed in.

Team members are rotated annually, though the CSS representative has stayed on as the team lead. Each team member is assigned a day to monitor feedback, and they meet as a team weekly to review data, identify trends, and work on process improvements.

This structure has proven successful. Over the nearly four years since Dorwin was introduced, feedback indicating a user may not have gotten the answer they need has steadily decreased, though overall chatbot usage has steadily increased. (See table and chart 1) This shows us that the data-driven, collaborative work this team does has improved the tool over time.

	Button clicks	Questions	Interactions (Button Clicks + Questions)	Uncertain response	Uncertain Response Rate	Reported	Reported Rate	Feedback (Uncertain Response + Reported)
<b>21-22 Team</b>	248,033	158,615	406,648	23,725	14.96%	8,387	5.29%	32,112
<b>22-23 Team</b>	298,961	137,199	436,160	13,434	9.79%	6,147	4.48%	19,581
<b>23-24 Team</b>	339,855	137,036	476,891	7,320	5.34%	6,269	4.57%	13,589

Table 1

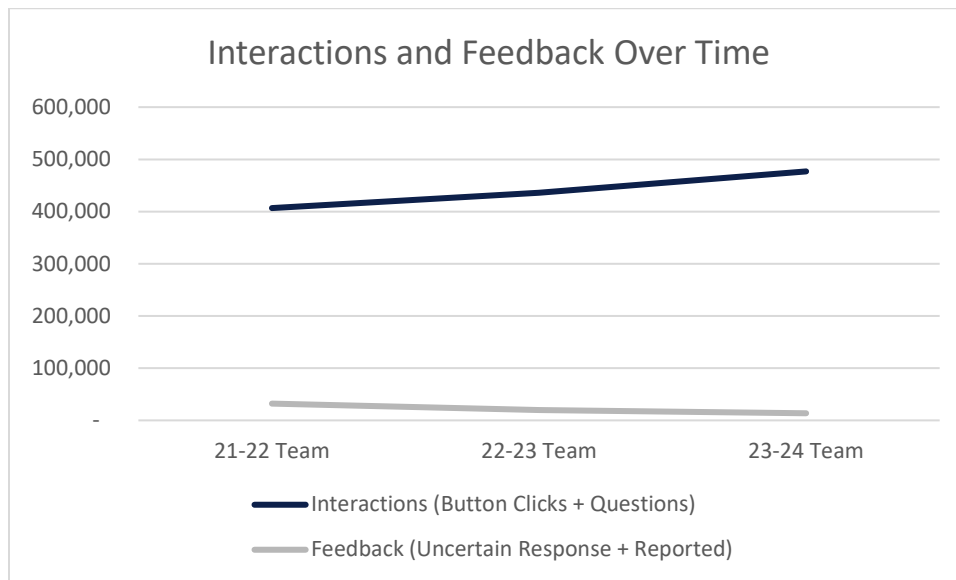


Chart 1

While we will continue monitoring and improving Dorwin, we are entering the maintenance phase with the chatbot and no longer have a pressing need for large-scale content improvements. With this change in capacity, the 2024-2025 Dorwin team has been working on a special project recommended by our 2024 CPM graduate Julia Smith. In her CPM project, Smith recommended that we “look at the chatbot process recently implemented by the IRS and determine how we can replicate it with our existing tools, both to collect better data and to improve customer experience.” (Smith, 2024) The IRS process uses chatbot technology to help address customer questions from notices or letters.

As of January 2025, the Dorwin team has launched a Notices Help Tool pilot project inspired by the IRS tool Smith researched. Though still in its pilot phase, the project has already proven useful to the agency and serves as an example of how the Dorwin team could expand its scope in the future.

### Case study: State IT Offices – Minnesota and Missouri

The state of Minnesota transformed their IT office and began using an Agile project management methodology to better meet the customer experience needs of their constituents. The core element of this transformation was a team—the Product and Agile Center of Enablement (PACE).

In their NASCIO award submission, they detail the impacts of PACE, and they specifically recommend that state agencies adopt a project model “that leverages persistent teams of business and technology resources and persistent funding to support the underlying technology assets.” They repeatedly emphasize the need for dedicated, diverse project teams that focus on continuous improvement in order to meet project and product needs to support their customers. The success of this case study is backed by PACE’s Net Promoter Score (NPS) of 78, which they say indicates “high levels of customer satisfaction and endorsement for the program.” (State of Minnesota: Minnesota IT Services, 2024)

The Missouri Office of Administration, Information Technology Services Division, was a 2024 finalist for the NASCIO State CIO Office Special Recognition award for their project: *Digital Government Transformation is a Journey – Building Missouri’s Digital State*.

The Missouri Information Technology Services Division rose to their Governor's challenge and expectation that "Missouri state government become more transparent, more citizen friendly, more efficient, more focused, and more accountable." While there were several initiatives undertaken as part of this project, they have a common theme of creating more communication, understanding, and accountability to unite all state agencies toward a common goal.

Through their project, they built "a good foundation of governance, prioritization, project identification, and relationship management with our agencies." (Missouri Office of Administration, Information Technology Services Division , 2024)

The initiatives of both projects, which build on a foundation of established, persistent, and diverse teams for governance, prioritization, and collaboration can be scaled down to our agency in our own efforts to transform our digital experience.

## Leveraging the data

Using these case studies as background, I spent more time in our system to assess what data is available and how useful and accessible it is in leading to informed decisions.

In late October 2024, we implemented the Submission Feedback functionality, another recommendation from Julia Smith's 2024 CPM project. This effort was led by Julia's DORWAY team, with support from me and the Communications & Strategic Solutions team. This data will give us some of the most direct insight into our customer experience, since it allows for customer comments along with ratings. Ideally, those who rate their experience as poor will

also leave a comment with their specific issue. However, we need to collect enough data to identify these issues as trends before deciding whether to take corrective action.

Some of the other data available, while detailed, will require more research to create meaning. For example, in addition to the abandonment rate for each submission, we can see at which point in the process the user abandons the submission. This gets us closer to understanding their experience but doesn't yet give us the full picture. Let's say the first screen has the highest abandonment rate. Maybe the user thought it was something else when they clicked on it, and we should change the title. Maybe they saw the information they needed to complete the submission and realized they needed to come back to it later. We can use the system to find detailed information about each user's specific interaction, which brings us closer to answering these questions. But, this takes additional time and personnel to research.

Overall, the data available in our system about user interactions with MyDORWAY can offer us detailed and helpful insight into our customer experience, but only with time, research, and oversight.

## Implementation Plan: Expanding the Dorwin team

Based on the case studies of other agencies that have multi-divisional project teams or dedicated customer experience teams and based on the success of our Dorwin team, I recommend that we leverage the existing structure of the Dorwin team and expand it into a Customer Experience Team.

Before this can happen, the Dorwin team needs to continue its work on the Notices Help Tool and develop a long-term plan for that project. The implementation of the Notices Help Tool is

currently planned through fiscal year 2025 (June 30, 2025), and the annual rotation of Dorwin team members will happen around this same time. Toward the end of this period, the current Dorwin team should develop recommendations for the next Dorwin team and the continuation of the Notices Help Tool project to include whether to continue adding notices, which ones to add and by when, and what ongoing maintenance will look like.

Simultaneously, the group responsible for implementing the Submission Feedback tool should meet to review and discuss the first six months of data at the beginning of May 2025. This group should develop recommendations similar to those of the Dorwin team, including whether to add new submissions to the tool (and if so, which ones), who should review the data and how often, who should determine whether any changes are needed based on the data, and a general ongoing maintenance plan.

With these two sets of recommendations, I would meet with my teammate who is the Dorwin team lead and a small set of leaders from the DORWAY team to develop a multi-year plan to present to our agency leadership. We would outline expanding the Dorwin team's scope to include the needs of the Submission Feedback review. We also would develop a staggered approach to incorporating some of the other available data, ultimately expanding or branching off the Dorwin team to create a Customer Experience Team.

Because this approach builds on the existing Dorwin team, I expect it to be met with less resistance than if we were trying to build a Customer Experience Team from scratch. However, we know from experience in recruiting members for the Dorwin team, that our entire Executive

Team needs to be committed to the importance of this work in order to be willing to commit their staff to the team.

To help overcome potential resistance, we would outline the benefits for leadership—benefits for the agency, for their division, and for their selected employees—and set clear expectations up front of the work involved. We have several years of data and experiences that we can share to tell this story and ensure buy-in.

## Evaluation Method

To ensure the Customer Experience Team is meeting the goal of evaluating and using the customer experience data available to us on MyDORWAY, I recommend providing regular reports to our executive leadership and key stakeholders. Currently, Dorwin team leadership sends monthly and annual recap emails to key stakeholders that include overall usage statistics, updates on recent projects, and takeaways on the success of the tool based on data analysis. I recommend this continue through future evolutions, and I would add a quarterly email that includes executive leadership.

We can further evaluate whether this team is meeting the larger goal of providing a customer-centric experience by continuing to use an independent, third-party assessment like the survey conducted by Winthrop University. We will also continue to monitor the data available on MyDORWAY itself, including the Dorwin data, to ensure that we are meeting customer expectations.

## Summary and Recommendation

Creating a Customer Experience Team for the SCDOR would create a streamlined, efficient way for our agency to evaluate the success of our online services. In the short term, this structure would provide a framework for the team to develop necessary processes to evaluate and make decisions based on the customer experience data available to us. Keeping the general structure of the current Dorwin team—rotating team members and including representatives from across the agency—supports innovative thinking and holistic expertise, while allowing members to maintain focus on their day-to-day work. An evaluation of the team’s work paired with the periodic rotation of team members also allows flexibility for the team’s priorities to change as they learn from the data and in response to changing agency priorities or new data sources.

I recommend that our agency keeps an initiative on our strategic plan that represents the evolution of the Dorwin team into a Customer Experience Team. The initiative should remain for several years and should reflect an annual evaluation of the projects, processes, and people to allow for the gradual growth and development of the team.

With this centralized, data-driven focus on customer experience, we can ensure that we are meeting agency goals one and three: Increasing tax and regulatory compliance while providing a customer-centric experience.

## References

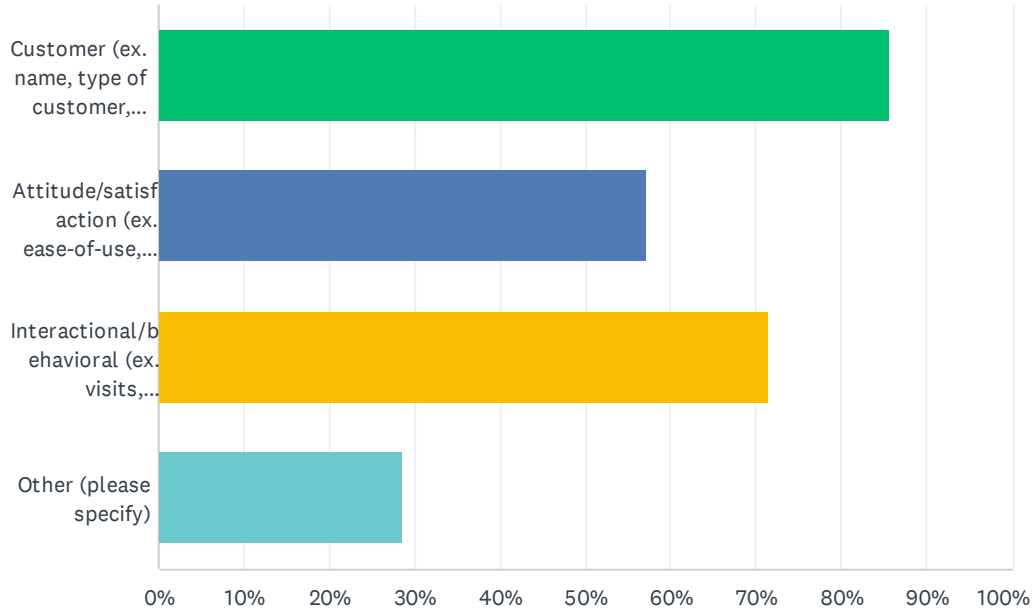
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## Appendix 1: Survey Results

Questions asking for respondent title, name, or contact information have been removed.

# Q1 Do you collect any of the following data on your TAP/eServices or other online services? (Choose all that apply)

Answered: 7 Skipped: 0



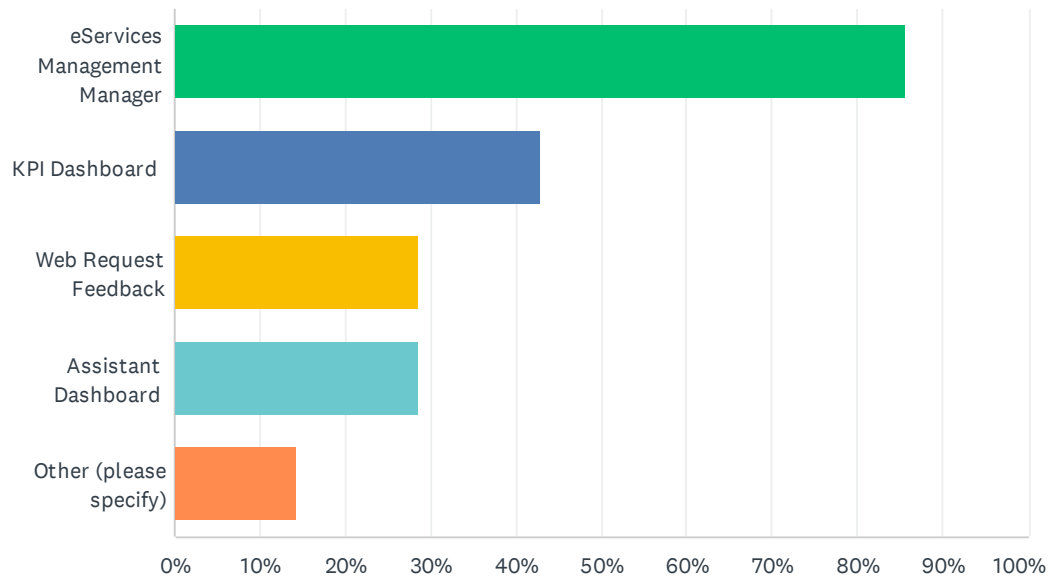
ANSWER CHOICES	RESPONSES	
Customer (ex. name, type of customer, location)	85.71%	6
Attitude/satisfaction (ex. ease-of-use, satisfaction with interaction)	57.14%	4
Interactional/behavioral (ex. visits, abandonment rate, clicks)	71.43%	5
Other (please specify)	28.57%	2
Total Respondents: 7		

#	OTHER (PLEASE SPECIFY)	DATE
1	<p>We track all relevant customer interactions through our eServices portal at govconnect.iowa.gov. Customer Insights Our eServices portal offers over 300 web requests that customers can access. These requests are integrated with our internal GenTax system, linking to customer and account registrations. We capture detailed customer information, including name, type, NAICS code, filing frequency, and location, providing a comprehensive view of user activity. Attitude and Satisfaction In late 2024, we added Fast's core Submission Feedback feature for select requests on the eServices portal, with plans to expand it further. This feature allows users to rate their experience on a scale of 1-5 stars and leave comments. Our eServices Manager currently reviews the feedback, creates support tickets, and shares insights with relevant teams. We plan to enhance our analytics capabilities around this feedback in 2025 to improve the customer experience. Interactional and Behavioral Analytics We closely monitor request abandonment rates and work proactively to understand user behavior. Our eServices team evaluates which requests see the highest abandonment rates by reviewing web session snapshots. This allows us to analyze user actions—such as what they clicked on first, how long they spent on each step, and what feedback they provided—to identify areas for improvement.</p>	12/13/2024 3:06 PM



## Q2 What dashboards and reporting tools does your organization use?

Answered: 7 Skipped: 0

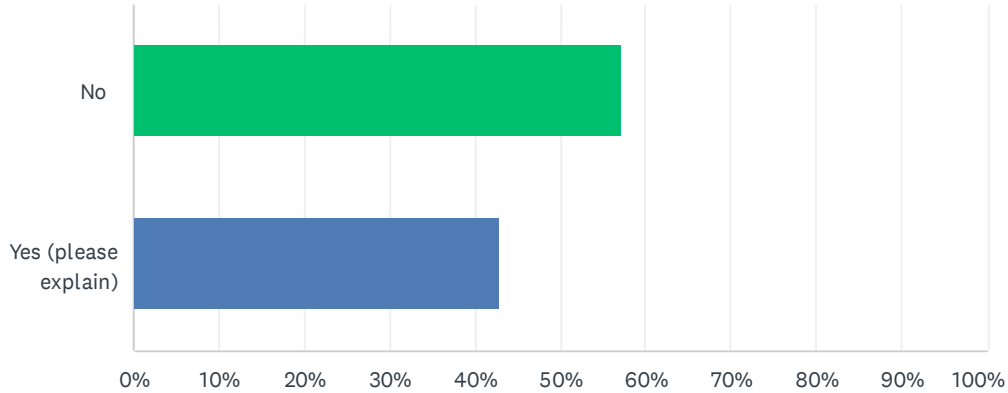


ANSWER CHOICES	RESPONSES	
eServices Management Manager	85.71%	6
KPI Dashboard	42.86%	3
Web Request Feedback	28.57%	2
Assistant Dashboard	28.57%	2
Other (please specify)	14.29%	1
Total Respondents: 7		

#	OTHER (PLEASE SPECIFY)	DATE
1	We built custom reports to help us analyze the eServices portals. Here are 3 helpful reports. Web Logon Analysis for All Open Accounts This report is a summary of all open accounts and whether at least one web logon has access to the accounts. It shows us a percentage of how many customers, based on their account type, use the eServices portals. If we are looking to communicate or for more online usage from a certain customer base, we look at this report to evaluate which communication methods would be efficient - mailing, GovDelivery, web notices. Number of Web Notices This report displays the number of open and closed web notices related to the "Send a Message" program in eServices. Our goal is to respond to all customer inquiries within 48 hours, this helps us understand how many open messages we have and if we need to dedicate more resources to the program. Web Logon Access Statistics This report displays how many web logons have been created under each access type and portal. This is helpful in determining the user account we are impacting if we make changes at an access type level.	12/13/2024 3:06 PM

### Q3 Do you track data on how your online services impact or connect with each other or with your other services? (ex. webpage hits connected to a letter you sent; online filing usage connected to webpage views, etc.)

Answered: 7 Skipped: 0

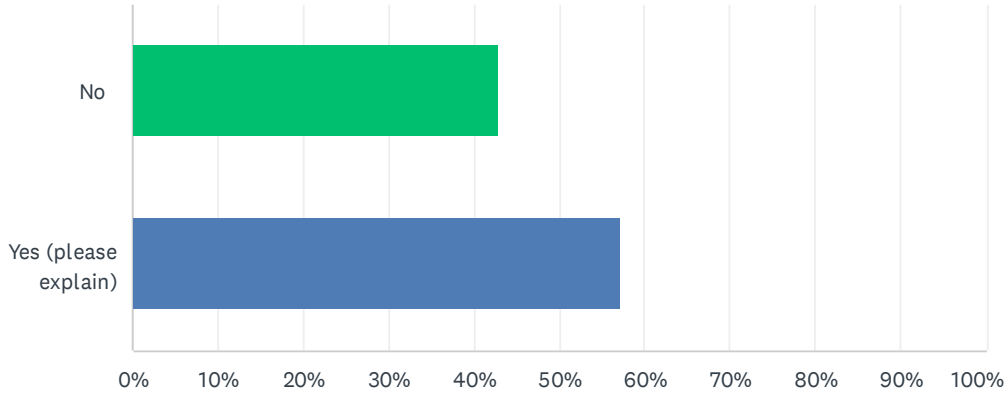


ANSWER CHOICES	RESPONSES
No	57.14% 4
Yes (please explain)	42.86% 3
TOTAL	7

#	YES (PLEASE EXPLAIN)	DATE
1	We are currently in the Planning phase of doing this but have not implemented this yet. We'd love to learn if other states are doing this and what they're doing.	12/13/2024 3:06 PM
2	We track issuance transactions and reinstatements	11/4/2024 2:03 PM
3	We are tracking clicks from our webpage tax.fi to our e-services. Especially how much our customers are using deep links to e-services.	11/4/2024 1:20 AM

## Q4 Does your organization have an individual or team assigned to track and analyze collected data?

Answered: 7 Skipped: 0

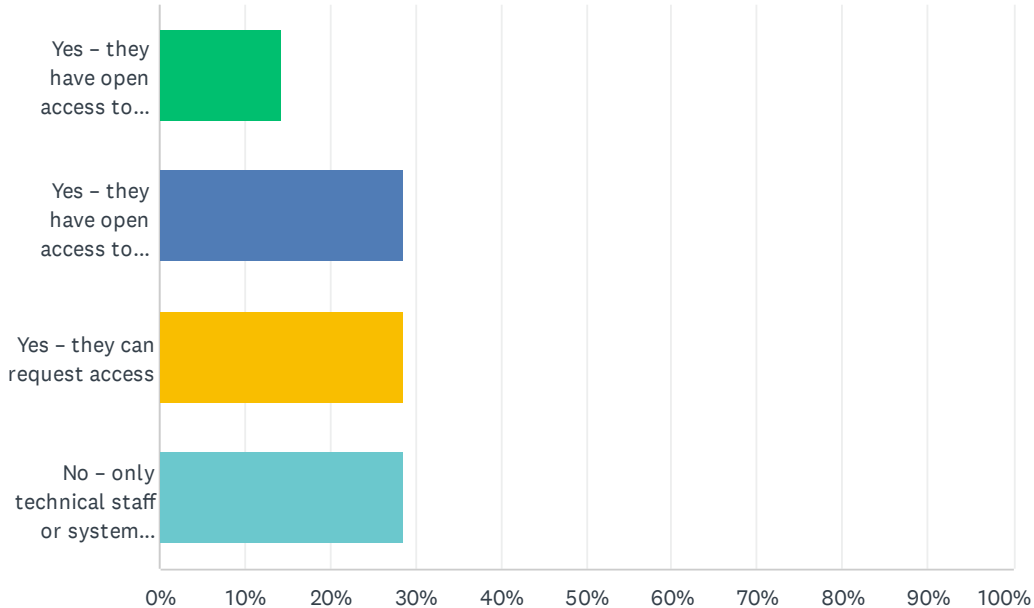


ANSWER CHOICES	RESPONSES
No	42.86% 3
Yes (please explain)	57.14% 4
TOTAL	7

#	YES (PLEASE EXPLAIN)	DATE
1	Iowa has an official Customer Experience Bureau with a dedicated eServices team that tracks and analyzes collected data. The team consists of two members: one responsible for managing the portals and conducting web request analysis, and the other overseeing incoming messages and the chatbot, while also analyzing web interactions related to both messages and the chatbot.	12/13/2024 3:06 PM
2	At this point it is just me, the GenTax e-Services PM on the state side	11/6/2024 8:55 AM
3	Hi, there is an e-Services team with the DOR. However, I am not sure how extensively they analyze the collected data.	11/4/2024 11:59 AM
4	We have small team for analysing the data. We gather information from multiple sources and combine it with PowerBI. For e-services, phone calls and chatbot responses we've set targets (e.g. rating 4 and 5 (scale 1-5) should be 84 percent of all feedback). We also use machine learning to check free text feedback.	11/4/2024 1:20 AM

### Q5 Do your business users/content experts have access to review the data for their service areas? (Ex. Can your sales tax employees access the data about the sales tax return submissions on your taxpayer portal?)

Answered: 7 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes – they have open access to relevant data, and they are expected to monitor it	14.29%	1
Yes – they have open access to relevant data if they want it, but there is no expectation that they monitor it	28.57%	2
Yes – they can request access	28.57%	2
No – only technical staff or system owners can review data and analytics	28.57%	2
<b>TOTAL</b>		<b>7</b>

#	ADDITIONAL EXPLANATION IF NEEDED	DATE
1	It's always available to the "Portal SMEs" aka the staff members who built and manage their specific portal but it is not open to the web request owners. They can have access to the data if they want it, but there is not expectation that they monitor it. That's the eServices team's job.	12/13/2024 3:06 PM

## Q6 Who is responsible for making decisions based on any data you collect? (Who determines acceptable thresholds? Who decides when and how to intervene when data is out of the acceptable range?)

Answered: 7 Skipped: 0

#	RESPONSES	DATE
1	Our eServices team is responsible for analyzing and sharing the information with the web request owners and the owners determine what to do with that data/feedback.	12/13/2024 3:06 PM
2	A combination of FAST, state developers, myself, and state side technical staff.	11/6/2024 8:55 AM
3	The Business Executive Leadership	11/4/2024 2:03 PM
4	Typically this is the Director of Taxpayer Services for the CO DOR.	11/4/2024 11:59 AM
5	Division Administrator	11/4/2024 10:04 AM
6	Ultimately, the decision would be up to our business units. However, they would receive direction and input from our Communications team and Business Analysts on our GenTax team. Note that the Business Analysts are more Subject Matter Experts/business-user focused than technical.	11/4/2024 9:10 AM
7	We have a separate customer unit who is responsible of the customer understanding. Goals are set by executives.	11/4/2024 1:20 AM

## Q7 Has your organization implemented an initiative or strategy that has successfully impacted online customer experience? If yes, please describe.

Answered: 7 Skipped: 0

#	RESPONSES	DATE
1	Yes. We implemented a plan that: 1. Created an eServices Site Map - The "eServices Site Map" that details all of the web requests and their attributes (Status, Portal, Team responsible, Letter response capability, Review Cadence, Associated paper forms, and more). 2. Created a portal committee that includes Department employees to help us make decisions that impacts all customers 3. All requests or changes to eServices, letters, forms, communications, or training must come through the Customer Experience team. This allows us to make sure the customer experience is consistent and follows ADA and Department standards. 4. Created a process for receiving customer feedback and implementing it. 5. Added a screen/workflow within our SQR process in FCR that allows us to ask: Is this making a change to eServices? Does this result in a change to a letter? Has it been approved by X and Y team? 6. Improved our "plain language" use Department-wide and on our eServices portals. Since we've implemented these, we've seen higher engagement from our staff to follow the established processes, happier taxpayers because we're consistent in our answers, and increased voluntary compliance because we've made it easy to use and understand.	12/13/2024 3:06 PM
2	Notifications, Action Center item, and web request associated with undeliverable addresses.	11/6/2024 8:55 AM
3	Yes, we have an eServices work group that strives to implement new services.	11/4/2024 2:03 PM
4	Generally speaking I would say yes, one of the DOR's Wildly Important Goals (WIGs) is to improve customer satisfaction. If SC wants more information, I can provide them a name from the DOR.	11/4/2024 11:59 AM
5	No	11/4/2024 10:04 AM
6	We recently overhauled all of our TAP emails, chiefly our submission confirmation emails to include more details about who submitted the payment/return. Our previous emails were very generic, making them not very helpful to third parties.	11/4/2024 9:10 AM
7	Yes, it's one of the key things in our strategy. You can read more from our website <a href="https://www.vero.fi/en/About-us/finnish-tax-administration/strategy/">https://www.vero.fi/en/About-us/finnish-tax-administration/strategy/</a>	11/4/2024 1:20 AM

## Q8 Please use the space below to elaborate on any of the previous information or share any other thoughts, ideas, or information.

Answered: 3 Skipped: 4

#	RESPONSES	DATE
1	Following up from the email "We have combined our Organizational Change Management, Training, e-Services, and Communications team to holistically approach the taxpayer experience and staff needs." We launched a Customer Experience Bureau that combines 5 areas, with a total of 9 FTEs: eServices, Communications, Organizational Change Management, Training, Forms & Correspondence. We'd be happy to share with you about what each team does. Feel free to ask more questions!	12/13/2024 3:06 PM
2	Eric Myers, the DOR Director of Taxpayer Services speaks often about improving customer services at conferences such as FTA Tech, RACC, WSATA.	11/4/2024 11:59 AM
3	We would like to implement web request feedback, at least on targeted submissions. We also plan to incorporate some text boxes on specific lines of returns where we have common errors. This would be to gather more info from taxpayers to see if our forms need revision, if taxpayer education is needed, or if we need to change return rules.	11/4/2024 9:10 AM

## Q9 Name of organization

Answered: 7 Skipped: 0

#	RESPONSES	DATE
1	Iowa Department of Revenue	12/13/2024 3:06 PM
2	Illinois Department of Revenue	11/6/2024 8:55 AM
3	Oregon DOT DMV	11/4/2024 2:03 PM
4	FAST	11/4/2024 11:59 AM
5	NE DMV	11/4/2024 10:04 AM
6	Vermont Department of Taxes	11/4/2024 9:10 AM
7	Finnish Tax Administration	11/4/2024 1:20 AM

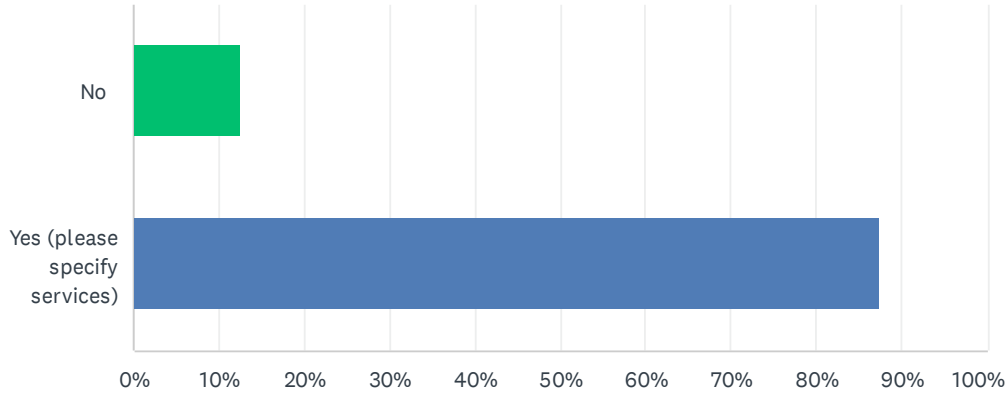
**Q1 Please briefly describe the online services that organization agency offers. This is whatever "online services" means to you, but may include your website, online forms or applications, a portal or app for your customers, etc.**

Answered: 8 Skipped: 0

#	RESPONSES	DATE
1	Our grants portal is used for application, review, and management of grants. Non-grant application processes are managed with Submittable. Our social media channels are Facebook, Instagram, YouTube, X, and LinkedIn. We offer webinars and conduct online surveys. Our agency website contains information about our agency and programs, including grant guidelines, our artist directory, and a general inquiries email address. Our news website, The Hub, includes an arts calendar and a venues map (all open for self-submissions).	11/22/2024 12:47 PM
2	Our website provides information, third-party contacts, regulatory archives, a payment portal for homeowners, and other related resources.	11/13/2024 10:27 AM
3	SCDOT collects data on-line through applications that provide a service for Work Requests, and Encroachment Permits. We also receive FOIA requests, and general inquiries.	11/12/2024 4:09 PM
4	Our online services range from those meant for the public, such as looking up who is licensed, to everything to become and stay licensed like apply, renew, and send documents to board staff.	11/5/2024 3:41 PM
5	PEBA provides a public website, two employer portals (one for insurance and one for retirement) and two member portals (one for insurance and one for retirement).	11/5/2024 9:35 AM
6	Our agency has an online webpage in general for filing complaints, any OSHA, FOIA, or licensee lookup. But the website also has individual pages for each Board and important information and forms for that specific Board	11/4/2024 12:40 PM
7	website, online forms, customer portal, mobile app, YouTube channel, Facebook, and Twitter.	11/4/2024 10:48 AM
8	Columbia Water/ Customer Services has a website: Columbiascwater.net, a chat feature on the website, as well as, our MyColaSC app for Apple and Android devices.	11/4/2024 10:21 AM

## Q2 Does your organization collect data on your online services, as described in the previous question?

Answered: 8 Skipped: 0

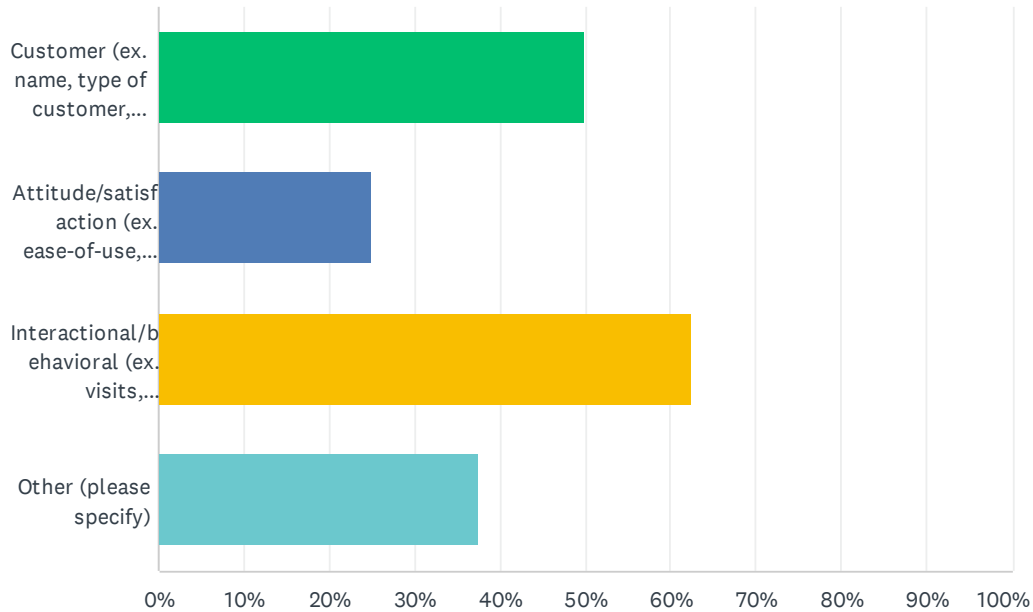


ANSWER CHOICES	RESPONSES	
No	12.50%	1
Yes (please specify services)	87.50%	7
<b>TOTAL</b>		<b>8</b>

#	YES (PLEASE SPECIFY SERVICES)	DATE
1	We collect data for our reporting, analysis, and recordkeeping primarily through the grants portal and Submittable. We also collect performance data from our social media channels and through Google Analytics. We track webinar attendance and survey responses.	11/22/2024 12:47 PM
2	Website visitors and specific pages that are visited the most.	11/13/2024 10:27 AM
3	In some cases we provide a customer survey to gauge how applications provide the needed services.	11/12/2024 4:09 PM
4	We collect information used to license people through our 42 different licensing boards.	11/5/2024 3:41 PM
5	Track analytics for website usage and portal logins.	11/5/2024 9:35 AM
6	Yes, on our website we tracked what is being accessed and at what frequency.	11/4/2024 10:48 AM
7	Both our website and our app feature data metrics such as page visits and open/closed work orders; respectively.	11/4/2024 10:21 AM

### Q3 What type of data do you collect? (Choose all that apply)

Answered: 8 Skipped: 0

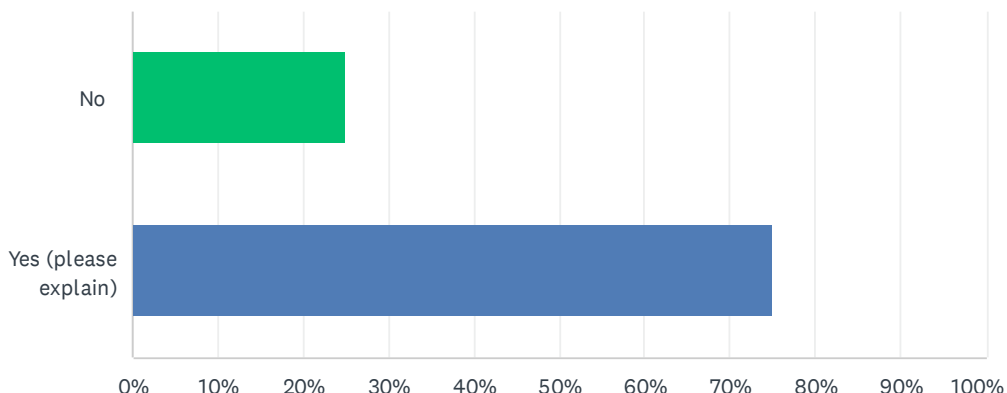


ANSWER CHOICES	RESPONSES
Customer (ex. name, type of customer, location)	50.00% 4
Attitude/satisfaction (ex. ease-of-use, satisfaction with interaction)	25.00% 2
Interactional/behavioral (ex. visits, abandonment rate, clicks)	62.50% 5
Other (please specify)	37.50% 3
Total Respondents: 8	

#	OTHER (PLEASE SPECIFY)	DATE
1	organization affiliation, arts discipline, grant history	11/22/2024 12:47 PM
2	Any data that is required by statute to license someone for the particular type of license they apply for.	11/5/2024 3:41 PM
3	Our Boards license individuals, for me specifically, cosmetologists, estheticians, nail techs, instructors for all, schools, salons, booth renters; barbers, instructors, shops schools and booth renters, hair braiders. We review to see how long staff takes to process an application, to complete a renewal, and the quality of their processing. We also monitor their call center to ensure they do not place a caller on hold for too long or to log out the center. In addition, each employee has a survey that a licensee/student/applicant can respond on how a staff member responds/assists with that person	11/4/2024 12:40 PM

### Q4 Do you track data on how your online services impact or connect with each other or with your other services? (ex. webpage hits connected to a letter you sent; online applications submitted connected to webpage views, etc.)

Answered: 8 Skipped: 0

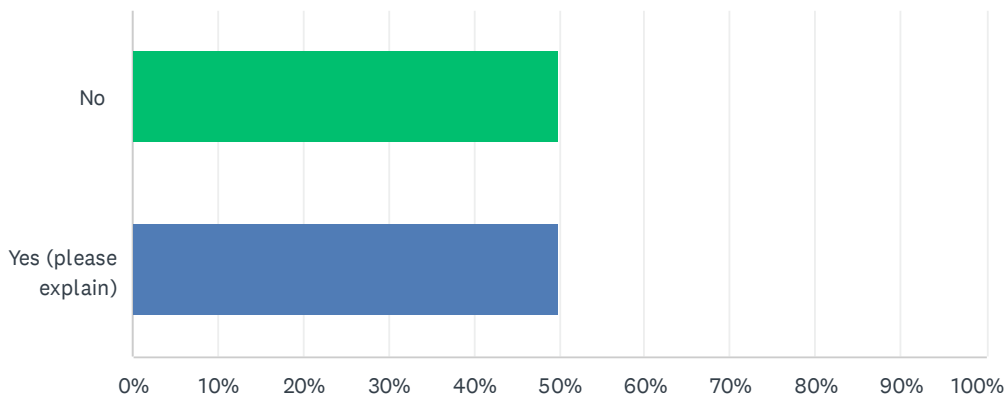


ANSWER CHOICES	RESPONSES
No	25.00% 2
Yes (please explain)	75.00% 6
<b>TOTAL</b>	<b>8</b>

#	YES (PLEASE EXPLAIN)	DATE
1	Our grant final reports (completed through the grants portal) ask about portal satisfaction. We track social media activity links to our websites. We use Google Analytics to see connections among our websites and social media channels. Webinar participation and survey responses inform future offerings.	11/22/2024 12:47 PM
2	If a person visits a specific page, E.g. if a person visits payment portal page and actually matriculates through to the portal.	11/13/2024 10:27 AM
3	One of our biggest is to push as many people as possible to apply and renew online. We do this mainly through eblast, automated reminders, and website content. We do not do much in depth study but have notice these things have helped.	11/5/2024 3:41 PM
4	We track open and click rates for emails we send to employers and members.	11/5/2024 9:35 AM
5	Yes, but this is something that is monitored by our IT department	11/4/2024 12:40 PM
6	The Communications Team uses page visits to inform our social media content and schedule.	11/4/2024 10:21 AM

## Q5 Does your organization have an individual or team assigned to track and analyze collected data?

Answered: 8 Skipped: 0

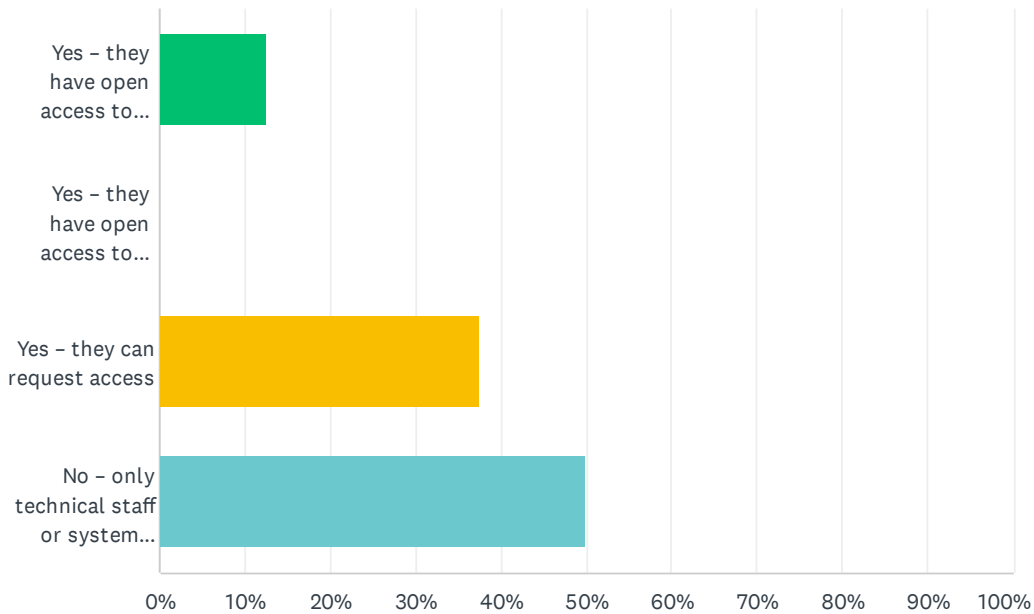


ANSWER CHOICES	RESPONSES
No	50.00% 4
Yes (please explain)	50.00% 4
TOTAL	8

#	YES (PLEASE EXPLAIN)	DATE
1	Collecting Data is an agency-wide effort. Analyzing data is primarily done through the agency's Data Strategist. Our Digital Communications Manager tracks and analyzes social media data.	11/22/2024 12:47 PM
2	Our Communications Department is responsible for the website and emails. Our IT Department is responsible for the employer and member portals.	11/5/2024 9:35 AM
3	My PCI will assist me in pulling reports and analyzing what we need to do to improve with processing	11/4/2024 12:40 PM
4	Columbia Water Communications monitors and analyzes data.	11/4/2024 10:21 AM

### Q6 Do your business users/content experts have access to review the data for their service areas? (Ex. Can the employees who process a submitted application access the data about the webpage that explains the application or the data about the user's interaction with the application portal?)

Answered: 8 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes – they have open access to relevant data, and they are expected to monitor it	12.50%	1
Yes – they have open access to relevant data if they want it, but there is no expectation that they monitor it	0.00%	0
Yes – they can request access	37.50%	3
No – only technical staff or system owners can review data and analytics	50.00%	4
<b>TOTAL</b>		<b>8</b>

#	ADDITIONAL EXPLANATION IF NEEDED	DATE
1	Access and expectations vary depending on the platform and data. For some things, they have open access to relevant data if they want it, but there is no expectation that they monitor it. For some things, they can request access. And for some things, only technical staff or system owners can review data and analytics.	11/22/2024 12:47 PM
2	Survey data is collected and assessed for areas in need of improvement.	11/12/2024 4:09 PM

## Q7 Who is responsible for making decisions based on any data you collect? (Who determines acceptable thresholds? Who decides when and how to intervene when data is out of the acceptable range?)

Answered: 8 Skipped: 0

#	RESPONSES	DATE
1	Depending on what it is: Whoever is requesting the information; the social media manager; program directors with their supervisors; Executive Team; Leadership Team; Data Strategist.	11/22/2024 12:47 PM
2	Information Technology	11/13/2024 10:27 AM
3	Individual program managers	11/12/2024 4:09 PM
4	Senior staff level and above.	11/5/2024 3:41 PM
5	Communications and IT departments	11/5/2024 9:35 AM
6	There are certain data that I can approve at my level. Others must be approved at Board level (Board members during a public meeting) Example: An applicant has a SLED report with several charges - If the applicant's charges/convictions are more than 5-years and he/she is not on probation, I can approve to move forward with the application process (felony). If the applicant has convictions (felonies) of less than 5-years and/or is on probation, they must appear before the Board for final approval for licensure.	11/4/2024 12:40 PM
7	Our agency's security officer.	11/4/2024 10:48 AM
8	Data collected through the ColumbiaScWater.net website is the responsibility of the Communications Manager.	11/4/2024 10:21 AM

## Q8 Has your organization implemented an initiative or strategy that has successfully impacted online customer experience? If yes, please describe.

Answered: 8 Skipped: 0

#	RESPONSES	DATE
1	Grants portal FAQ and tutorials; after-hours auto-replies to social media direct messages; communications campaign to revitalize arts calendar visibility and use (including redirection replies to mass mailings, direct messaging to grantees and board members).	11/22/2024 12:47 PM
2	We're currently undergoing a website redesign with Tyler Technologies to enhance the overall usability of our website.	11/13/2024 10:27 AM
3	Make more on-line services available, and improve the ease of use as well as accessibility of those services.	11/12/2024 4:09 PM
4	Automated renewal reminders have helped us greatly. During the renewal period for a specific board, we send reminders at certain timeframes to those who have not renewed at that time.	11/5/2024 3:41 PM
5	No	11/5/2024 9:35 AM
6	Each Board has a specific email address that is under that Board's webpage. Anyone has the access to send in questions to that email address for assistance. A majority of all Board applications are online. A licensee can access their data, renew, apply, change information and submit documents through their online portal.	11/4/2024 12:40 PM
7	Our YouTube channel has been successful in educating the customer on what's available to them, where to find it, and how to use. We also reference the YouTube channel for those customers that have difficulties processing things online.	11/4/2024 10:48 AM
8	The launch of the MyColaSC customer care portal. Users may submit data privately or publicly. Citizens have been empowered to share photos of their concerns; which helps with internal prioritization of work flows.	11/4/2024 10:21 AM

**Q9 Please use the space below to elaborate on any of the previous information or share any other thoughts, ideas, or information.**

Answered: 3 Skipped: 5

#	RESPONSES	DATE
1	These answers were collected from our Grants Coordinator, Data Strategist, Arts and Education Accessibility Coordinator, Digital Communications Manager, and Communications and Constituent Services Manager. All are willing to discuss in more detail.	11/22/2024 12:47 PM
2	The agency's website uses a bespoke content management system, limiting the functionality of the site. This leads to delays in updating the site and hampers the presentation of information which is often shoehorned into one of three page types.	11/13/2024 10:27 AM
3	Currently we are working on marketing all cosmetologists and barbers to use the online renewal to renew their license as of January 2, 2025.	11/4/2024 12:40 PM

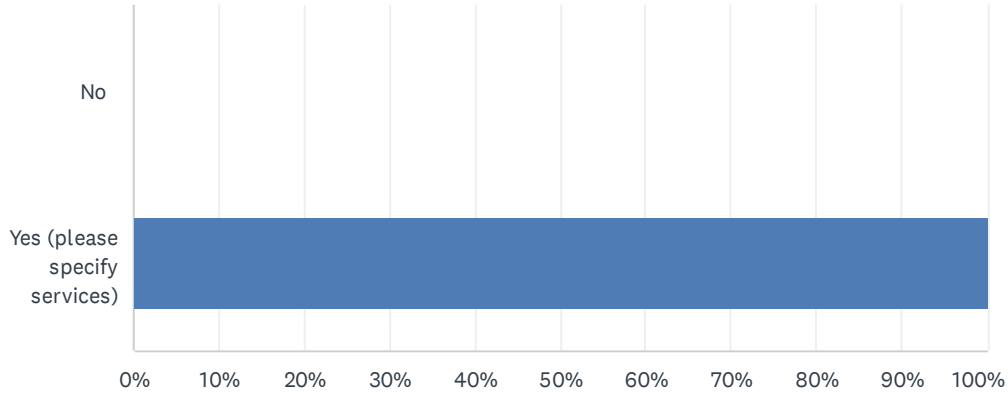
## Q10 Name of organization

Answered: 8 Skipped: 0

#	RESPONSES	DATE
1	South Carolina Arts Commission	11/22/2024 12:47 PM
2	SC Housing (South Carolina Housing Finance and Development Authority)	11/13/2024 10:27 AM
3	SCDOT	11/12/2024 4:09 PM
4	SC Dept of Labor, Licensing and Regulation	11/5/2024 3:41 PM
5	S.C. PEBA	11/5/2024 9:35 AM
6	SC Labor, Licensing and Regulation	11/4/2024 12:40 PM
7	South Carolina Department of Motor Vehicles	11/4/2024 10:48 AM
8	Columbia Water Customer Services	11/4/2024 10:21 AM

# Q1 Does your organization collect data on your online services, including your website and taxpayer portal?

Answered: 7 Skipped: 0

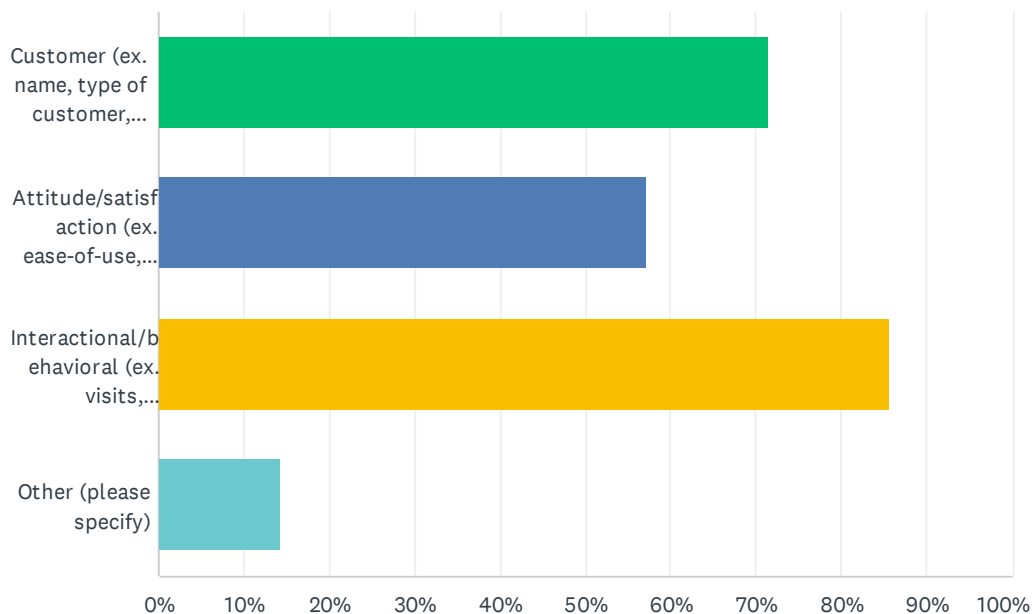


ANSWER CHOICES	RESPONSES
No	0.00% 0
Yes (please specify services)	100.00% 7
<b>TOTAL</b>	<b>7</b>

#	YES (PLEASE SPECIFY SERVICES)	DATE
1	We have an online survey on all of our websites including our portals	11/20/2024 3:54 PM
2	Public website (surveys and analytics) Taxpayer Portal (surveys)	11/8/2024 3:00 PM
3	Colorado tracks the ability to file and pay on many tax types. We are a GenTax state and use data out of the e-services manager to track.	11/7/2024 3:56 PM
4	For our informational website all questions asked to our AI Chatbot, and its answers, are recorded. For our online filing portal, when logged in, all actions preformed by the user are recorded and saved for 30 days.	11/1/2024 11:22 AM
5	Our website and online filing/payment system were built in house. We also have the following online services provided by Tyler Technologies: Online appointment scheduler, new payment portal, ChatBot and LiveChat.	11/1/2024 8:13 AM
6	We look at number of interactions, common words / phrases used in the search page, most commonly accessed forms or documents	10/31/2024 2:58 PM
7	1) Online customer experience feedback and survey form 2) GenTax (CRM) customer satisfaction survey regarding a specific online service 3) Chatbot data	10/31/2024 1:55 PM

## Q2 What type of data do you collect? (Choose all that apply)

Answered: 7 Skipped: 0

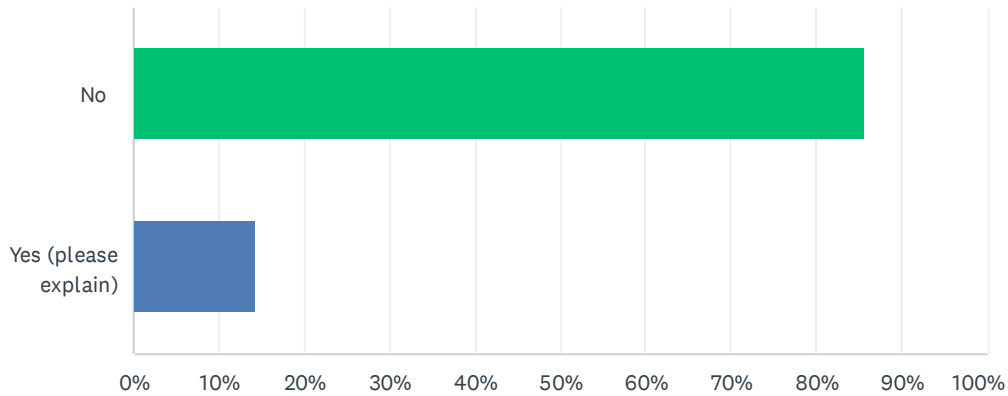


ANSWER CHOICES	RESPONSES	
Customer (ex. name, type of customer, location)	71.43%	5
Attitude/satisfaction (ex. ease-of-use, satisfaction with interaction)	57.14%	4
Interactional/behavioral (ex. visits, abandonment rate, clicks)	85.71%	6
Other (please specify)	14.29%	1
Total Respondents: 7		

#	OTHER (PLEASE SPECIFY)	DATE
1	Specific online service used IP address Timeliness of the services provided Ability of the agency to provide services correctly the first time Helpfulness of the agency employees Knowledge and expertise of the agency employees Availability of information Overall quality of service provided	10/31/2024 1:55 PM

### Q3 Do you track data on how your online services impact or connect with each other or with your other services? (ex. webpage hits connected to a letter you sent; online filing usage connected to webpage views, etc.)

Answered: 7 Skipped: 0

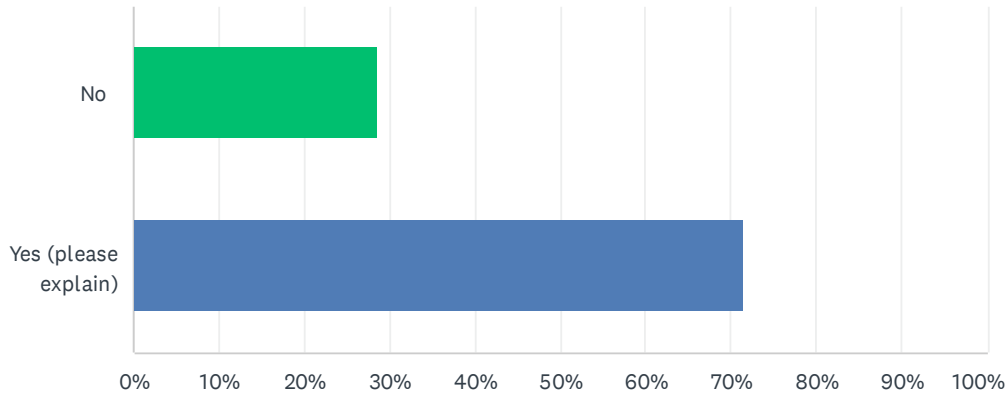


ANSWER CHOICES	RESPONSES
No	85.71% 6
Yes (please explain)	14.29% 1
<b>TOTAL</b>	<b>7</b>

#	YES (PLEASE EXPLAIN)	DATE
1	We have different websites. For our regular websites we use google analytics to check on clicks, downloads an other things of that nature. On our portals we check our internal system for abandonment rates.	11/20/2024 3:54 PM

## Q4 Does your organization have an individual or team assigned to track and analyze collected data?

Answered: 7 Skipped: 0

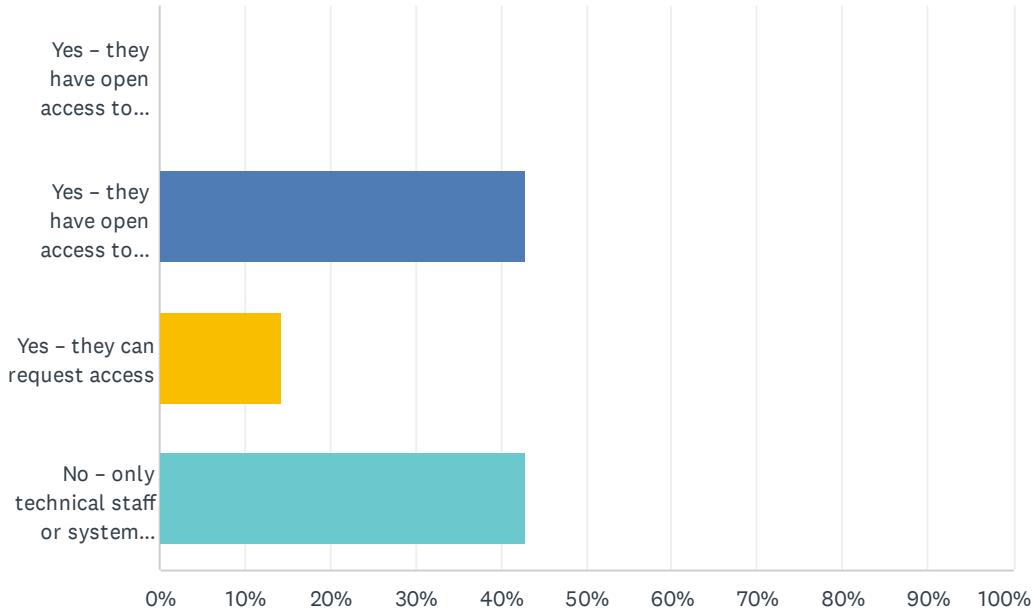


ANSWER CHOICES	RESPONSES
No	28.57% 2
Yes (please explain)	71.43% 5
TOTAL	7

#	YES (PLEASE EXPLAIN)	DATE
1	Our webmaster tracks the data on our regular websites. While our portals are checked different individuals throughout the organization	11/20/2024 3:54 PM
2	In General Tax Administration, members of the Communications team are assigned to collect and distribute surveys (monthly) and website analytics data (quarterly).	11/8/2024 3:00 PM
3	Our e-services team (5 people, including a supervisor) tracks usage data on our e-services platform.	11/7/2024 3:56 PM
4	We have a communication team that tracks and analyzes the data.	10/31/2024 2:58 PM
5	Our Customer Experience Center of Excellence (CxCOE) tracks, analyzes and publishes reports and dashboards. CX feedback and survey dashboard is automated with information from phone survey, online survey and gentax survey (coming soon).	10/31/2024 1:55 PM

### Q5 Do your business users/content experts have access to review the data for their service areas? (Ex. Can your income tax employees access the data about their webpage or the data about income tax payments on your taxpayer portal?)

Answered: 7 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes – they have open access to relevant data, and they are expected to monitor it	0.00%	0
Yes – they have open access to relevant data if they want it, but there is no expectation that they monitor it	42.86%	3
Yes – they can request access	14.29%	1
No – only technical staff or system owners can review data and analytics	42.86%	3
<b>TOTAL</b>		<b>7</b>

#	ADDITIONAL EXPLANATION IF NEEDED	DATE
1	For our portals not all of our reporting features are developed	11/20/2024 3:54 PM
2	While data is collected and made available, there is no process in place that requires processes to monitor and utilize the data.	11/8/2024 3:00 PM

## Q6 Who is responsible for making decisions based on any data you collect? (Who determines acceptable thresholds? Who decides when and how to intervene when data is out of the acceptable range?)

Answered: 7 Skipped: 0

#	RESPONSES	DATE
1	We have a customer experience team who reviews our survey results, phone call topics, and abandonment rates and come up with solutions. These solutions are then presented to directors who then decide if we will proceed with the solutions.	11/20/2024 3:54 PM
2	It depends on the priority of needed action that has been identified. Orders for high priority interventions come the executive office, while Communications or a process may decide to act on lower priority items on their own.	11/8/2024 3:00 PM
3	Taxation's senior leadership	11/7/2024 3:56 PM
4	IT staff to include our ISO, DBA, various IT Managers and the Deputy Director.	11/1/2024 11:22 AM
5	Senior management	11/1/2024 8:13 AM
6	Deputy Director of Administration	10/31/2024 2:58 PM
7	Customer Experience Center of Excellence in collaboration with Implementation team composed of the management from different units.	10/31/2024 1:55 PM

## Q7 Has your organization implemented an initiative or strategy that has successfully impacted online customer experience? If yes, please describe.

Answered: 7 Skipped: 0

#	RESPONSES	DATE
1	Our number one phone call topic for our motor vehicle division was asking for fee estimations for titling and registering a vehicle. We premiered a Fee estimator on one of our portals. This then dropped the topic to the 4th most common topic in about 2 months.	11/20/2024 3:54 PM
2	Communications reviewed analytics data over several periods of time and determined what the most popular pages were. Using that information, we prioritized these pages on our website for ease of access. We also created the website survey to get direct feedback from our website users to aid us in improving their experience.	11/8/2024 3:00 PM
3	implemented a predictive analytic chatbot in 2021; currently engaged in customer journey mapping for e-services.	11/7/2024 3:56 PM
4	Nope, our website are brand new and were still in the learning stage regarding their use and impact.	11/1/2024 11:22 AM
5	ChatBot and LiveChat have positively impacted our customer experience based on feedback.	11/1/2024 8:13 AM
6	We have had a couple of projects to improve the search functionality and usability for both our external and internal websites.	10/31/2024 2:58 PM
7	Customer experience dashboard shows customer feedback, trends and insights. The dashboard is accessible to the agency management at different levels, including communications and other cross-functional teams. The Customer Experience Center of Excellence regularly reports on several CX KPIs and reviews feedback. The feedback also serves as a source of valuable information on how to improve our online and other services and alert if our systems malfunction. For example, if a customer reported that something is not working on our website, the Communications office receives automatic notification about it. Suggestions on how to improve our online portal automatically forwarded to our Revenue Online team.	10/31/2024 1:55 PM

## Q8 Please use the space below to elaborate on any of the previous information or share any other thoughts, ideas, or information.

Answered: 3 Skipped: 4

#	RESPONSES	DATE
1	We have two projects in the works that should significantly impact the customer service experience. One: we are creating and publishing YouTube videos for taxpayers as an alternative to more text-heavy communications. Two: We are transitioning to a new eFile and Pay vendor beginning in 2025.	11/8/2024 3:00 PM
2	Our state recently acquired GenTax services and we're in the process of having them developed and deployed.	11/1/2024 11:22 AM
3	We are working on adding customer feedback from our online portal to the existing internal CX dashboards so that we can include this information with the rest of CX feedback and KPIs and also bring that information to the wider audience and inform of trends and any insights.	10/31/2024 1:55 PM

## Q9 Name of organization

Answered: 7 Skipped: 0

#	RESPONSES	DATE
1	Utah State Tax Commission	11/20/2024 3:54 PM
2	Florida Department of Revenue - General Tax Administration	11/8/2024 3:00 PM
3	Colorado Department of Revenue	11/7/2024 3:56 PM
4	State of Nevada Department of Taxation	11/1/2024 11:22 AM
5	Kansas Department of Revenue	11/1/2024 8:13 AM
6	South Dakota Department of Revenue	10/31/2024 2:58 PM
7	Oregon Department of Revenue	10/31/2024 1:55 PM