Slide 1: Strategic Plan 2021-2025 (Draft)
Presenter(s) Name(s): Chrissy Casale and Cathy McCollum – Finance and Executive Services Division

Slide 2: Strategic Plan 2021-2025 (Draft)
Subtitle:
“Goal 1 – Taxpayer Centric Service”
- Deleted: “Taxpayer Centric”
- Inserted: “Exceptional”

New subtitle text reads, “Exceptional Service”

Body text:
Old text reads: “Enhance our services to help taxpayers fulfill their tax obligations.”
- Deleted: “services to help taxpayers fulfill their tax obligations”.
- Inserted: “Strive to continuously enhance our customers’ experience”

New body text reads: “Strive to continuously enhance our customers’ experience.”

A photo is shown of a woman tapping on her electronic tablet.

Slide 3: Strategic Plan 2021-2025 (Draft)
Subtitle:
“Goal 1 – Exceptional Service”

Body text:
Item 1.1 body text: Old text reads, “Evaluate customer experience needs across all service channels; develop and implement a roadmap to meet those needs.”
- Deleted: “a roadmap”.
- Inserted: “solutions”

Item 1.1 new body text reads, “Evaluate customer experience needs across all service channels; develop and implement solutions to meet those needs.”

Item 1.2 body text (no change): “Champion an organizational culture to achieve positive customer experiences.”
Item 1.3 body text: Old text reads, “Promote the use of self-service tools to improve service to our customers.”

- Deleted: “Promote the use of self-service tools to improve service to”
- Inserted: “Educate”
- Inserted: “on the use of multi-channel services and information to improve their experience.”

Item 1.3 New body text reads, “Educate our customers on the use of multi-channel services and information to improve their experience.”

**Slide 4: Strategic Plan 2021-2025 (Draft)**

**Subtitle:**

“Goal 2 – Effective Compliance” (no change)

**Body text:**

“Fairly administer the law to ensure taxpayers file and pay the correct amount.” (no change)

A photo is shown of three people sitting at a table with documents in front of them.

**Slide 5: Strategic Plan 2021-2025 (Draft)**

**Subtitle:**

“Goal 2 – Effective Compliance”

**Body text:**

Item 2.1 body text: Old text reads, “Identify noncompliant taxpayer segments and customize our actions to improve compliance.”

- Deleted: “Identify noncompliant taxpayer segments and customize our actions to improve compliance.”
- Inserted: “Strive to continuously enhance our customers’ experience.”

Item 2.1 New body text reads, “Identify noncompliant segments and implement campaigns to improve compliance.”

Item 2.2 body text: Old text reads, “Discover and implement new approaches to increase compliance in the most egregious areas of abuse.”

- Deleted: “Discover and implement new approaches to increase compliance in the most egregious areas of abuse.”
- Inserted: “Improve data, information, and knowledge sharing with the tax community and government partners.”
Slide 6: Strategic Plan 2021-2025 (Draft)

Subtitle:
“Goal 2 – Effective Compliance”

Body text:
Item 2.4 body text: Old text reads, “Improve case selection in all compliance programs.”
  • Deleted: “Improve case selection in all compliance programs.”

Item 2.5 body text: Old text reads, “Improve timeliness in all compliance programs.”
  • Deleted: “Improve timeliness in all compliance programs.”
  • Inserted: “Item 2.3, “Improve case selection and timeliness in all compliance programs.”

Slide 7: Strategic Plan 2021-2025 (Draft)

Subtitle:
“Goal 3 – Strong Organization” (no change)

Body text:
Old text reads, “Invest in our employees, challenge and empower them to be experts in their field, and help them achieve their full potential.”
  • Inserted: “Value”
  • Inserted: “have an enterprise view”

New body text reads, “Value, invest in, challenge, and empower our employees to have an enterprise view, be experts in their field, and achieve their full potential.”

A photo is shown of a man presenting information from a poster to two women sitting at a desk with papers and an electronic tablet.

Slide 8: Strategic Plan 2021-2025 (Draft)

Subtitle:
“Goal 3 – Strong Organization” (no change)

Body text:
Item 3.1 body text: Old text reads, “Prioritize and implement the Talent Management Program services to help us recruit, train, and retain our employees.”
  • Deleted: “Prioritize and implement the”
  • Deleted: “Program”
  • Deleted: “recruit, train”
Item 3.1 new body text reads, “Continue to cultivate and enhance Talent Management services, which help us to attract, develop, engage, and retain our employees.”

Item 3.2 body text: Old text reads: “Increase employee engagement and job satisfaction by assessing and enhancing culture, workplace environment, and employee recognition.”

Item 3.2 New body text reads, “Increase employee engagement and job satisfaction by continuing to assess and enhance culture, focusing on diversity and inclusion, valuing employees as individuals, and celebrating employee achievements.”

Slide 9: Strategic Plan 2021-2025 (Draft)

Subtitle:
“Goal 3 – Strong Organization (continued)”

Body text:
Item 3.3 body text: “Support an environment where decisions are made at all levels by those who have both the expertise and best information.” (no change)

- Inserted: “3.4 Welcome, solicit, and value input and ideas from anyone in the organization.”
- Inserted: “3.5 Recruit and retain a high-performing workforce that leverages our state’s rich diversity and promotes inclusion.”

Slide 10: Strategic Plan 2021-2025 (Draft)

Subtitle:
“Goal 4 – Operational Excellence” (no change)

Body text:
Old text reads: “Optimize processes, products, services, and resources to better serve our customers.”
New body text reads: “Optimize our processes, products, services, and resources to better serve our internal and external customers.”

A photo is shown of a three women facing a laptop at a work table.

**Slide 11: Strategic Plan 2021-2025 (Draft)**

**Subtitle:**

“Goal 4 – Operational Excellence”

**Body text:**

Item 4.1 body text: “Manage budgeted resources at the enterprise level and use performance metrics to meet short- and long-term business needs.” (no change)

Item 4.2 body text: Old text reads, “Use data modeling and analytics to enhance operations.”

- Deleted: “Use data modeling and analytics to enhance”
- Inserted: “Validate and utilize data, as authorized, to make decisions and improve business”

Item 4.2 New body text reads, “Validate and utilize data, as authorized, to make decisions and improve business operations.”

Item 4.3 body text: Old text reads, “Leverage and modernize IT systems and processes to support enterprise business activities, including financial, human resources, and nontax programs.”

- Deleted: “enterprise”
- Deleted: “including financial, human resources, and nontax programs.”
- Inserted: “and improve”
- Inserted: “and administrative”

Item 4.3 New body text reads, “Leverage and modernize IT systems and processes to support and improve business activities.”

**Slide 12: Strategic Plan 2021-2025 (Draft)**

**Subtitle:**

“Goal 4 – Operational Excellence (continued)”

**Body text:**

Item 4.4 body text: Old text reads, “Mitigate emerging and evolving threats and manage risks to maintain taxpayer privacy and security.”

- Deleted: “maintain”
• Deleted: “taxpayer”
• Inserted: “protect”
• Inserted: “customer”

Item 4.4 New body text reads, “Mitigate emerging and evolving threats to manage risks and protect customer privacy and security.”

Item 4.5 body text: Old text reads, “Standardize our hardware and software to optimize operations.”
  • Inserted: “and modernize”

Item 4.5 New body text reads, “Standardize and modernize our hardware and software to optimize operations.”
  • Inserted: “4.6 Strengthen physical security to ensure the protection of our employees and mission critical operations.”

**Slide 13: Strategic Plan 2021-2025 (Draft)**

“Questions?”

**Slide 14: Strategic Plan 2021-2025 (Draft)**

“Public Comment”