

Wisconsin Connects with Customers



State of Wisconsin

**Department of
Revenue**

Award Category: Operational Efficiency

Project Dates: June 25 through October 31, 2024

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Executive Summary

The Wisconsin Department of Revenue (DOR) processes more than \$21.3 billion in revenue annually and administers the state's individual income, sales, corporate income, and excise taxes. In addition, the agency regulates alcohol and tobacco sales, oversees the Wisconsin Lottery and Unclaimed Property programs, and estimates state revenues while forecasting economic activity.

The agency's mission is to strengthen Wisconsin through fair tax and lottery administration, while educating and serving the public, customers, and communities.

A critical touchpoint for citizens and constituents, the agency's contact center employs 500 DOR agents who handle approximately 700,000 calls annually. Without a reliable contact center, taxpayers and businesses would struggle to receive timely answers regarding tax refunds, payments, business permits, lottery claims, and other essential services.

Historically, the previous contact center solution was costly to operate, relied on multiple disparate technologies, and lacked modern features—factors that negatively impacted the customer experience. Seeking to reduce costs, simplify technology, and prepare for future needs, the agency migrated to a new contact center platform in just four months—an unprecedented timeline for a project of this complexity.

The successful implementation resulted in 66% cost savings, a 60% reduction in hold times—timed perfectly at the start of tax season for a key business area—and a simplified, more reliable experience for both agents and callers. Today, the agency leverages the modern features of the new platform to drive continuous innovation, improve operational efficiency, and further enhance the customer experience.



Idea

DOR is a forward-leaning agency, constantly seeking opportunities to optimize spending and free up financial capacity to invest in the future. Alongside this financial stewardship, the agency is committed to simplifying its technological environment to reduce unnecessary complexity that often leads to inefficiencies.

While the previous contact center worked well, the agency faced several significant challenges:

- Multiple disparate technologies combined into a complex, custom-built solution.
- High operational costs are driven by per-seat pricing plus additional telephony charges.
- Frequent system outages, totaling 51 hours in a recent year.
- Difficult troubleshooting issues due to the complex architecture.
- Lack of modern analytics tools for supervisors.
- Challenges in resource planning due to unreliable real-time data.
- Call delays caused by excessive routing across multiple phone infrastructure locations nationwide.

Amazon Connect as a Solution

Wisconsin DOR's technology leadership attended a demonstration of Amazon Connect and immediately recognized its potential as a replacement solution that could address these challenges. Amazon Connect offered a usage-based cost model rather than per-seat pricing, promising significant savings over the previous contact center. Furthermore, it provided simplified technology architecture hosted entirely within Amazon Web Services (AWS), reducing complexity and improving reliability.

The platform also included advanced features that the agency believed could enhance both the customer and agent experience. Encouraged by these possibilities, the agency decided to move forward with Amazon Connect.

Exciting New Features

One of the most impactful features that DOR was eager to implement was the real-time analytics and quality management capabilities powered by artificial intelligence. Amazon Connect automatically generates transcripts of calls and produces call summaries, which are presented to agents shortly after each call ends.

Agents can use these summaries as Customer Relationship Management (CRM) notes within the department's tax processing software. While department staff review and edit the summaries for accuracy, when necessary, many notes require little to no modification. This streamlined approach significantly reduces the time agents spend documenting calls, resulting in meaningful time savings per interaction.

Implementation

Modernizing a contact center of this complexity is a significant undertaking, yet DOR completed the project rapidly, allowing contact center staff ample time to become comfortable with the new system before the busy tax season began.

Agency leadership was eager to realize cost savings quickly and set an ambitious go-live date. From the outset, project staff worked with a strong sense of urgency, fully aware that contact center agents needed to handle calls effectively on day one with minimal disruption to service. Ensuring staff felt well-prepared for the system cutover was a top priority, achieved through comprehensive communications and training.



The agency adopted an agile approach to solution development, collaborating closely with ScaleCapacity as the implementation partner and AWS staff. The internal project team included a project manager and two technical resources, supported by a dedicated quality assurance testing team. Regular meetings with a steering committee facilitated timely decision-making, while weekly status reports kept all stakeholders informed and aligned.

ScaleCapacity contributed a team comprising of a project manager and several cloud software engineers who translated the agency's requirements into a tailored solution. They maintained close collaboration with agency staff to clarify and refine requirements throughout the project lifecycle.

AWS personnel remained actively engaged, monitoring progress and assisting in resolving issues as needed. AWS provided both an account manager and a customer success manager, whose roles were instrumental in overcoming obstacles, particularly in setting up the AWS environment and facilitating the phone number porting process.

Impact

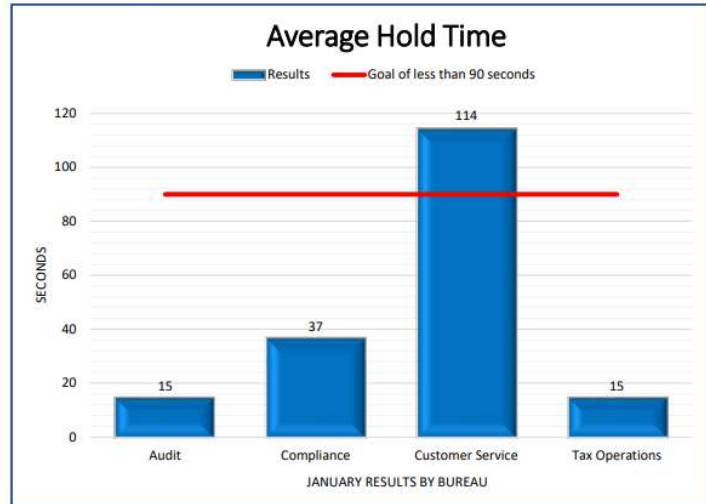
As a result of this project, the Wisconsin Department of Revenue (DOR) now operates a more capable and resilient contact center that has improved business outcomes and freed up capacity for future innovation.

After five months of using the new software, including through the busy tax season, the agency is realizing a 66% cost savings compared to the previous solution. The shift from a per-seat pricing model to a usage-based cost structure has realigned incentives, encouraging the agency to optimize call flows and expand self-service options to reduce call volume.

Unexpected Success

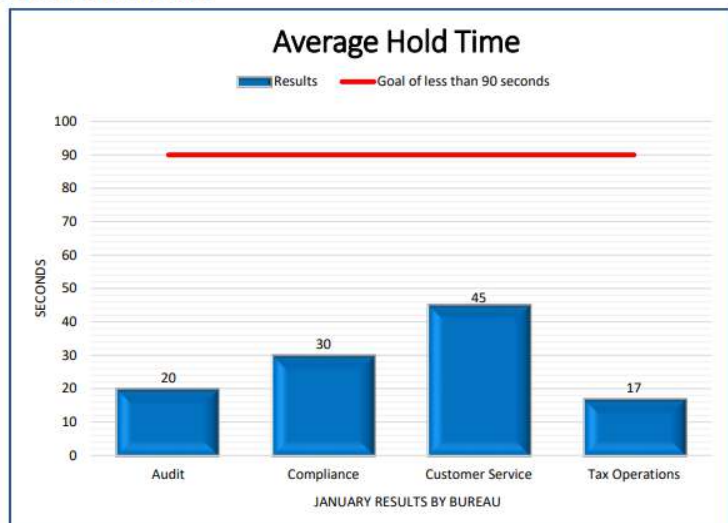
January 2023

Phone Response Results



January 2024

Phone Response Results



As part of the transition, the agency streamlined workflows, resulting in more efficient navigation through call trees and significantly reduced hold times. Average hold times during the start of the busy season in January, dropped from 114 seconds year-over-year to just 45 seconds, at half the agency-set goal of 90 seconds, despite reduced staffing levels due to budget constraints.

Additional Operational Improvements

- AI-powered call summaries: Replacing manual documentation tasks, enabling agents to handle more calls daily.
- Real-time dashboards: Allowing supervisors to monitor current call volume and recent agent performance easily.
- High-quality, natural-sounding voice changes on demand: Eliminating the need to manually record voices for each flow update, unlike the previous system.
- Searchable transcripts: Facilitating easier call analysis, reporting, and follow-up.
- Caller sentiment monitoring: Providing insights into customer experience and highlighting areas needing follow-up or additional training.
- Forecasting and scheduling tools: Enabling data-driven decisions to optimize staffing levels.

Contact Center Governance

The agency has established an oversight committee responsible for managing changes to Amazon Connect that impact multiple business areas. Additionally, the agency is expanding the use of the contact center and AWS services to other areas.

One planned initiative involves leveraging advanced data analytics through AWS data lake services integrated with business intelligence tools. This will provide deeper insight into contact center activity, allowing measurement of agent and center performance against targets and identification of opportunities to further improve call flows and enhance customer experience.

Another initiative in development is the deployment of an AI assistant trained on existing knowledge bases to quickly answer caller questions, which will be especially beneficial for newer agents.

Conclusion

Overall, this project has proven to be a valuable investment. The agency has achieved significant cost savings and gained access to new features that have already streamlined internal processes. The contact center is now more resilient, with higher uptime and a simplified telephony architecture.

Looking ahead, Wisconsin DOR is focused on continuous innovation and future investments. This transformation serves as a model for other agencies aiming to modernize their citizen contact center infrastructure, demonstrating how cloud-based solutions can deliver rapid, measurable improvements in operational efficiency and customer satisfaction.