

FTB 2021-2025 Strategic Plan Update: Goal 1 – Exceptional Service PowerPoint

Franchise Tax Board Meeting
Monday, September 9, 2024

Slide 1: FTB 2021-2025 Strategic Plan Update: Goal 1 – Exceptional Service

Strive to continuously enhance our customers' experience

Presenters' Names: Erin Dendorfer – Legal Division and Daryl Lee – Administrative Services Division

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Slide 2: Strategic Plan Goals

- Goal 1: Exceptional Service
- Goal 2: Effective Compliance
- Goal 3: Strong Organization
- Goal 4: Operational Excellence

Slide 3: Goal 1: Exceptional Service

Strive to continuously enhance our customers' experience

1.1 Evaluate customer experience needs across all service channels; develop and implement solutions to meet those needs.

1.2 Champion an organizational culture to achieve positive customer experiences.

1.3 Educate our customers on the use of multi-channel services and information to improve their experience.

Slide 4: Customer Service Wait Time Dashboard Enhancements

- Include personal and business collection timeframes
- Display enterprise contact centers' wait times
- Allow real-time information updates every minute
- Offer links to self-service options.

Slide 5: Field Office Appointments

- Launched the ability to schedule in-person appointments online
- The automated system sends text message updates as the appointment approaches
- 93% approval rating from our public counter customers

Slide 6: MyFTB Online Account Enhancements

Real-Time Identity Proofing

- Historically, accounts required that FTB send users a PIN in the mail to activate their account
- Since February 2022, taxpayers and tax professionals can gain access to their MyFTB account in real-time

Slide 7: MyFTB Online Account Enhancements

- Returns and payments are now available to view in MyFTB faster
- Provides an option to view e-filed tax returns in a text-only format to ensure the information is accessible to all users
- Allows taxpayers to protest Notices of Proposed Adjustment for Carry Over Amounts

Slide 8: Other Accomplishments

- Launched the virtual hold technology for the Tax Practitioner Hotline
- Made Individual Status Letter request enhancements

Slide 9: Questions?

Slide 10: Public Comment