



FTA Awards Nomination/Entry Form

Person who led this effort or project

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About your program, idea, or project

Name your program, idea, or project: Compliance Bureau Learning Culture

What is the problem that you wanted to solve? The Compliance Bureau needed to improve our training program in three different areas – for new agents, for advanced level agents, and for supervisors. New employees completing 10 weeks of intense classroom training are not as effective, experienced employees are not as prepared for career progression and the increasing complexity of their work, and supervisors are underserved in the areas of professional development, leadership, and motivating employee engagement.

Who was involved in addressing the problem? Compliance managers, two training coordinators and their supervisor.

How did they go about finding a solution? Together, the team reviewed the existing new agent training program and the training provided to experienced agents to decide what types of training and work is appropriate for employees at various levels of experience.

Supervisors also identified their training needs relating to leadership, employee development/coaching, engagement, and specific job/task related training.

Describe the outcome. What is the new idea, approach, program, or activity? Several solutions work in tandem to deliver job relevant content at the right point in an agent's development and career progression. Overall, we completely revamped how we approach training new agents, changed the delivery and duration of training opportunities for existing employees to promote collaboration and continued engagement in learning, and launched skills development training for our supervisors and lead workers.

We now have a structure that includes two new training units that focus on developing a strong foundation of knowledge and best practices for our new agents. This structure provides consistent feedback and review of work. Trainees attend only a few weeks of classroom training, broken into three different steps (visual outline included in attachment A). This training implements best practices for teaching adult learners, including periods of learning then doing with repetition before introducing new information.

- Step 1: General onboarding, system navigation, and basic investigation.
- Step 2: Tax types, collection philosophy and basic collection actions.
- Step 3: Business taxes and advanced investigations/collection actions.

Trainees work from a training task queue that drives work of the appropriate complexity to them. More complex work generally moves into the work queues assigned to more experienced agents. If a trainee receives an account with something they haven't yet learned how to do, they are trained to recognize that and set the account to flow to a work queue for more experienced agents who have that knowledge.

After approximately 9 months, agents progress from the training units to their permanently assigned units. Revenue Agent bootcamps are being developed for those progressing to the next levels of the revenue agent classification.

Bootcamp training focuses on more complex work that was removed from initial new agent training. Approximately six months prior to reclassifying to the next agent level, an agent attends bootcamp training to learn how to complete more complex duties expected at the new classification level. After training, the agent starts receiving that type of work. This "just in time" training supports employees with the right information at the right time as they prepare for their reclassification to the next level.

More experienced employees also participate in Revenue Agent 2 & 3 Focus groups. These small groups are facilitated by a lead worker or experienced agent and concentrate on reviewing a collection philosophy issue, collaborating on a difficult account, or covering a refresher training topic. These cross-unit groups promote group learning, collaboration, and peer problem solving.

Additionally, the Bureau's Peer Assistance Team (PAT) is a valuable resource all bureau employees can use. This initiative gives agents a resource in-the-moment when they encounter something new or particularly challenging. Employees post questions on a message board or call the PAT phone number to talk with an experienced agent about a potential pathway forward on an account. Inquiries are tracked to improve future bureau-wide training.

The Fall 2022 annual all-bureau training conference was completely reimaged. Gone were power points and lecture-style presentations, in favor of a more collaborative "build your own adventure" group training. Each assigned table included agents at various experience levels, as well as a supervisor or lead worker. The scenarios provide the groups a multitude of options to consider as they attempt to "solve" their case. Five different "account" scenarios were developed to give the groups six decision points as they determine the appropriate timely, progressive collection actions needed to solve their case. The training team embedded false-leads and additional information for each decision outcome that directs groups to the more appropriate answer at that decision point. Some steps require the group to reach out to Compliance leadership to have their question answered or gain approval for the action step they choose. See attachment B for feedback from the activity and attachment C for the activity rules, and one of the scenarios.

To invest more energy into the skills of our bureau's leaders,

supervisors and lead workers attend quarterly all-day meetings structured with topics that balance "soft skills," employee performance management, and workload management topics. Philosophy discussions are also a component of each meeting for a consistent approach in all our units. When possible, we bring in an outside presenter to train on specific topics.

What has changed since this was implemented? How have your operations improved? Include any data, analytics or metrics that would show the value of your program. Don't forget management advantages such as improved morale.

Collections are up significantly. Because of our efforts to assign the right complexity of work to employees at the right levels of experience, and our focus paths to enable employees to do more of what they do best every day, our more experienced employees are more effectively working business accounts that need attention. Delinquent collections for Corporation/Franchise, Withholding, and Sales/Use tax types is up 45% (\$34 million) year to date over the average collections for these tax types.

There is an increase in collaboration and consistency between our units. New agents:

- Are given sufficient time and training before being presented with calls and accounts.
- Are more confident, and we no longer hear comments of feeling overwhelmed.
- Have a more consistent experience and more focused support as they learn the duties of their new positions.

Additionally, when trainees are reassigned out of the training units, they are better prepared and more self-sufficient than agents in prior hiring classes with the old training program. These changes have given our supervisors the opportunity to focus more on developing our agents' personal and professional goals.

During fall training, employees working through their scenario were engaged and excited. Employees expressed gratitude for the opportunity to meet and collaborate with employees located throughout the state and from different units. Even some of the most experienced employees said they learned something during the exercise.

Supervisors are much more engaged during quarterly meetings and have positive things to say about our efforts to support them and their employees through our learning culture initiatives.

Is there any component of your program that makes it workable only in your state or city?

Everybody ought to be doing this.

Is this an in-house project, or did you partner with an outside vendor or service-provider?


100% in-house

What comes next – will you be adding to your program, rolling it out more widely, trying additional approaches?

We are continuing to develop ongoing training for our existing employees, implementing "bootcamps" for those agents getting ready to reclassify to the next level to ensure they have appropriate skills and background for their new responsibilities.

Additional Optional Materials

Documentation Upload

Compliance Learning Culturepdf