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: Reinventing Quality Assurance: Multilingual, AI-Powered Call Reviews for Modern Tax Administration

What is the problem that you wanted to solve?

Supervisors and Lead workers conduct monthly quality assurance reviews of collection agent work, with some quality reviews focused on account work (investigations, handling of tasks, etc), and some focused-on phone interaction. Leadership conducted monthly quality reviews to monitor performance and ensure quality service, reviewing on average three account work and three phone interactions monthly for each employee with newer employees having more accounts and calls reviewed and more seasoned employees having fewer. While effective, this process was time-intensive, limited in scale, and primarily focused on account progression rather than the quality of customer interactions. Over the years employees have expressed frustration that the limited sample size is not representative of their work. A single quality review may take a lead worker or supervisor on average 12 minutes to complete – multiplied by up to 12 agents per unit. These manual reviews of employee work limited the ability to consistently evaluate staff performance. There was a clear need for a more efficient, scalable solution that could reduce administrative burden while providing broader insight into employee performance particularly in the areas of professionalism, the customer experience, and including Spanish-language calls.

Who was involved in addressing the problem?

This was a collaborative, in-house effort involving:

- Bureau Managers -Managers provided strategic direction and sponsorship for the initiative. Their willingness to act as early adopters of AI-enabled reviews set the tone for the organization and signaled a commitment to innovation. They were critical in reframing performance evaluation from a focus on account progression to a emphasis on professionalism and quality service. Managers also ensured alignment with organizational goals, removed barriers to implementation, and reinforced expectations across all levels of leadership.
- Frontline supervisors and lead workers -Supervisors and leads were instrumental in bridging strategy and execution. They ensured that the call review questions, and evaluation criteria aligned with the intended outcomes, particularly the shift toward professionalism and customer experience. They also played a key role in addressing initial concerns, including hesitation or uncertainty around AI-driven evaluations. By building their own knowledge and capability with AWS and AI tools, they became advocates for the process. As the primary point of contact for staff, they led consistent communication, coaching, and reinforcement.
- Frontline staff - Frontline employees were essential in building trust and credibility throughout the process. By engaging them early, the bureau ensured transparency in how the AI review model would function and how it would impact their work. Their feedback helped shape a process that aligned with real customer interactions and the operational needs. Just as important, frontline staff served as trusted voices among their peers reinforcing understanding, reducing uncertainty, and supporting adoption through direct, day-to-day communication.

Each group played a critical role in shaping the solution, ensuring it was practical, effective, and aligned with operational needs.

How did they go about finding a solution?

With the implementation of Amazon Connect call center software, we identified an opportunity to leverage the system's AI capabilities to modernize the phone call quality review process. Other call center vendors offer a similar tool.

The team:

- Evaluated existing standardized call review questions and updated them to focus on professionalism and service quality. We removed account maintenance pieces of phone call reviews that an AI tool listening to the call would not be able to evaluate
- Tested the AI solution in the background, including Spanish-language calls, concurrent to our existing quality review process to validate accuracy and identify improvements
- Ensured criteria could be applied consistently across both English and Spanish calls
- Engaged staff early to gather feedback and understand perceptions
- Communicated transparently across all levels to build trust and ease adoption
- Made targeted refinements based on employee feedback and extensive review of test evaluations before full implementation

This inclusive approach ensured both technical effectiveness and strong organizational buy-in.

Describe the outcome. What is the new idea, approach, program, or activity?

The bureau implemented an AI-powered automated call review process that evaluates customer interactions without requiring manual scoring by leadership.

This new approach:

- Focuses phone call performance evaluation strictly on professionalism and customer interaction quality
- Uses AI to consistently assess calls
- Enables significantly more reviews to be completed in less time and adds the ability to review calls in both Spanish and English
- Reduces reliance on manual processes while increasing insight into performance
- Enables more timely feedback to employees, and quicker identification of trends or challenges for supervisors and managers
- Failed quality reviews are routed to a lead worker or supervisor to confirm the result, provide specified feedback for the employee, offer opportunities to collaborate on a challenging case, and ensure timely and constructive support

The result is a modernized, data-driven approach to workforce evaluation.

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.

The implementation has resulted in measurable operational improvements:

- Time Savings: Leadership time spent on manual reviews has been significantly reduced by approximately 400 hours annually
- Increased Review Volume: More calls are now reviewed consistently, improving oversight (25% of all calls per employee or up to 80 monthly – up from between two to four called per employee monthly)
- Enhanced Insights: A shift to professionalism-based evaluation provides a more comprehensive view of employee performance related to customer interaction
- Improved Consistency: Standardized AI scoring reduces subjectivity and variability
- Positive Employee Response: Staff have embraced the new process, with minimal issues and only minor refinements needed

In addition, leadership is now able to focus more on staff development and strategic priorities rather than administrative review tasks, contributing to improved morale and engagement.

Its multilingual capability further enhances scalability, allowing agencies serving diverse populations to apply consistent performance standards across languages without additional manual effort.)

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

Another agency with a similar tax type or this kind of problem could adapt or adopt this idea.

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

100% in-house

Additional information or comments about your usage of outside vendors or service providers.

This is a fully in-house developed solution. While built using Amazon Connect infrastructure, the design, development, implementation, and refinement of the AI call review process were all led internally by the business area – no programmer, software engineer, or external consultation needed!

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

Following successful implementation, additional bureaus within the organization are planning to adopt the model, expanding its impact.
The approach has also been shared in national forums, generating interest among peer agencies.
Future enhancements include refining evaluation criteria and further integrating insights into workforce development strategies. We are exploring the use of call theming, where the AI tool listening to the call can help us identify topics discussed in the call to provide better insights on why customers are calling. This data will help leaders to identify improvements to webpage guidance, proactive outreach, language on letters, or collection case flow/activities.

Additional Optional Materials