Deliver personalized tax agency programs and communications at the right time – every time

Collect and connect data across touch points to build a dynamic taxpayer profile.

Improve program engagement through analytically optimized and guided taxpayer journeys.

Use technology assets that have security, privacy and ethics integrated by design.

The Issue

As tax agencies expand the engagement channels through which they interact – such as web, email and contact centers – their need for a comprehensive, unified view of the taxpayer intensifies. To keep pace and provide excellent customer service that meets citizen expectations, tax agencies need quick, easy access to a dynamic digital taxpayer profile. This profile needs to incorporate an abundance of information from multiple data sources. And it needs to reflect the taxpayer's complex journey across digital (online) and traditional (offline) touch points. With access to a holistic customer profile, tax agencies achieve an improved understanding of the customer. In turn, they can deliver the right information at the right time – and in the right way – to each taxpayer.

The benefits of being able to quickly communicate and respond to taxpayers regarding societal, environmental or legislative changes – across all engagement channels – are enticing. Expenses related to advising taxpayers are reduced across manual channels, like the contact center. Tax agencies can use high volume, low cost and easily automated channels like the web for proactive outreach, education and scalable collection efforts. Clear communications on tax regulations increase the likelihood of taxpayer participation and compliance.

The Challenge

Integrating digital and traditional data. Taxpayer data is complex. Behavioral data is captured from websites and digital devices, while transactional data is pulled from multiple tax agency systems. Collecting and combining this diverse data from internal and external sources, including the cloud – then joining it into a single customer profile – is essential for agencies trying to achieve a holistic, omnichannel view of the taxpayer.

Establishing a program to analyze outreach efforts. To effectively evaluate outreach efforts across channels, tax agencies need to clearly define success, understand taxpayer behavior and actions, and analyze why efforts fail or succeed. If agencies understand the significance of different journeys, they can guide taxpayers to successful outcomes via next-best action delivery – whether it's program engagement, voluntary enrollment or collection.

Optimizing taxpayer communications. Knowing the right set of taxpayers to target – and which message to use in each channel – helps agencies develop successful outreach efforts. With personalized, optimized communications, tax agencies can deliver the right message at the right time – in a guided versus forced manner. This saves time, money and resources – and improves voluntary compliance.

Our Approach

SAS® helps tax agencies improve customer experience and outcomes. Agencies can analyze the customer journey, evaluate actions and respond rapidly to digital activities – building effective taxpayer journeys across channels and attributing value to outreach actions. With SAS, agencies can:

- **Create a digital taxpayer profile.** SAS dynamically captures granular behavioral data across digital properties – transforming raw digital data into analytics-ready information.

- **Verify identity behind the scenes.** Using digital identity services for verification, agencies can ensure a smooth customer experience across the taxpayer journey.

- **Accommodate privacy regulations.** With SAS, there's no need to move sensitive personal data to the cloud to join it with online taxpayer data to do segmentation or analytics. A hybrid cloud architecture from SAS lets you access and manage cloud data, combine it with on-site data, and use it immediately – where it lives.

- **Automate data collection for attribution.** Agencies can use SAS to capture and configure web-based data as well as nondigital channel data. This provides insight into what channels are working best for taxpayers or program participants, what content and messaging resonates on those channels, and how to optimize and refine future engagement methods.

- **Measure goals and create visual reports.** Illustrate program and channel results in easy-to-understand reports.

- **Generate the best outcomes.** Rely on embedded analytical techniques like segment discovery, optimization and automated targeting to set objectives. With software that embeds insight out of the box, agency staff can easily understand and refine taxpayer outreach programs to generate ideal outcomes.

The SAS® Difference

With SAS, tax agencies have an easily accessible view of the taxpayer's journey across channels, devices and touch points – along with data and analytics to proactively drive taxpayer engagement in relevant programs. SAS Analytics helps tax agencies evaluate which programs and communications are most appropriate and timely so they can always deliver the right information at the right time. SAS provides:

- Access to real-time data that informs communications and tax program updates – and analytics to ensure efforts stay focused on programs and communications that are contextually relevant.

- Program engagement propensity modeling, which enables current participant understanding and informs agencies of future engagement drivers.

- Analytical calculations instead of conditional, rules-based logic. This allows tax agencies to move to real-time decisioning that is backed by advanced technologies like machine learning – then deploy those insights into action.

- Built-in technology to help protect data privacy so tax agencies can engage without fear of violating compliance, regulations or privacy laws.

- Real-time scoring that ties policy decisions to strategic agency and taxpayer engagement actions.

WHY SAS® FOR TAXPAYER ENGAGEMENT?

Reimagine the taxpayer experience to build trust.

Create a holistic taxpayer data profile.

Accelerate digital maturity and transformation.

Increase taxpayer program engagement through analytically guided journeys.

Boost metrics like tax program participation and overall satisfaction.

Learn more about SAS solutions for public sector finance

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