



DEPARTMENT
of REVENUE

EXCEEDING CUSTOMER SERVICE EXPERIENCES

Christina Owens, Compliance Specialist Supervisor

Local Government Services

CAVEAT 2024



Christina L. Owens

Compliance Specialist Supervisor, Digest Compliance | Local Government Services Division

Georgia Department of Revenue

4125 Welcome All Road, Suite 701 | Atlanta, Georgia 30349

Phone: (404) 724-7000 | Cell: (470) 698-5524 | Fax: (404) 724-7011

christina.owens@dor.ga.gov

CUSTOMER SERVICE EXPERIENCE

The support
you offer
taxpayers,
from the
moment your
office is
contacted.

01

Providing excellent customer service means being open, transparent and reliable to your taxpayers, going beyond expectations, and helping taxpayers make informed decisions to enhance their satisfaction.

02

Practice of supporting taxpayers before, during, and after their problem, providing a positive experience-

What is your definition?
What are your values?

03

Transparency means communicating honestly and openly with taxpayers about business matters.

Customer Service

The Face & Voice of
Your Company

Taxpayers
will tell
others
about their
customer
service
experience.



Great
Customer
Service
Experience

vs.

Good Customer
Service

Customer Experience



Encompasses **all touchpoints**
within a customer journey. It's
proactive in nature.

Customer Service



Covers only **one stage** of the entire
customer journey. It's reactive in
nature.

HOW DO WE CLOSE THE GAP?

Operate with taxpayers in mind-
provide this experience



Empowered exceptional customer
service experience

Did you
solve their
issue?

Did you
address
their
concern?

Did you
make
taxpayer
feel valued?

Did you
meet their
need?

Did
taxpayer
feel
listened to?

VALUE PROPOSITION



- Getting what is really wanted and settling for less-
difference in how you feel about your experience
- You expected this- you got more than this-
always give more than expected with customer service
- Taxpayers have certain expectations on how to be treated, the type of customer service to receive, and how long the experience should take.
- If you meet expectations, you have delivered on value proposition

Anything which falls below is a negative customer service experience.

**What? Me?
Complain?!**



Impression of the
Tax Assessor's Office
is based on their interaction
with you.

Taxpayers can't complain
about customer service which
went above and beyond.



Key Aspects

ENHANCING CUSTOMER SERVICE EXPERIENCE

Property Owner Interaction

- Direct Engagement to understand needs, frustrations, challenges

Addressing Concerns of Property Owners

- Promptly resolving issues to ensure taxpayer satisfaction and build trust and rapport

Providing Accurate Information

- Furnishing accurate details on tax assessments
- Provide law, rules and regulations to aid informed decision making

Ensuring Tax Law Compliance

- Guiding property owners to tax obligations and assessment processes while adhering to tax laws

STRATEGIES FOR HANDLING PROPERTY OWNER INQUIRIES

Dedicated Support Team

- Specialized team to handle property owner inquiries

Clear and Accurate Information

- Provide property owners with *easily understandable* information

Timely Issue Resolution

- Ensure prompt resolution of issues to maintain positive relationships with property owners
- Exceeding expectations means keeping pace with taxpayers
- *If taxpayers have to reach out more than once, its already poor service*

Offer Diverse Communication Channels



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graph TD; A[Offer Diverse Communication Channels] --> B[Offer personalized assistance to address specific questions and concerns]; B --> C[Proactive Engagement];
```

Offer personalized assistance to address specific questions and concerns

Proactive Engagement

OPTIMIZE COMMUNICATION CHANNELS

ENHANCING TAXPAYER ENGAGEMENT

Phone and Email Support

- Providing responsive assistance through direct communication channels for quick resolution

In person

- Provide personalized assistance

Online Self Service

- Empower taxpayers with convenient digital platforms for self help and information retrieval

EMPOWER PROPERTY OWNERS WITH INFORMATION

Educational Resources

- Provide property owners with access to educational materials and resources

Exemptions and Appeals

- Inform property owners of available exemptions and procedures for appeals

Workshops

- Conduct informative workshops to facilitate understanding of tax obligations and educate taxpayers on assessment processes, regulations and taxation laws

ENSURE AD VALOREM TAX COMPLIANCE



Adhere to Tax Laws

Crucial for maintaining trust and credibility



Transparent Explanations

Provide clear and transparent explanations of assessment methods and any changes to property owners



Foundational Principles

TAXPAYERS 7 BASIC NEEDS

Friendliness

- Courteous and Polite Professionals

Empathy

- Understands concerns and appreciates taxpayers' interests

Fairness

- Adequate attention and provides fair and reasonable answers

Control

- Some influence on the outcome

Alternatives

- Range of options available towards satisfaction

Information

- Relevant and accurate information

Time

- Their time is valuable, be respectful of it

KEY CUSTOMER SERVICE FUNDAMENTALS



Responsiveness

Timely and proactive response to inquiries and concerns from property owners and taxpayers



Accuracy

Ensuring accurate information in all interactions and communications



Empathy

Demonstrating understanding and compassion towards the needs and challenges of property owners and taxpayers



Transparency

Openly providing information and being forthcoming about processes, policies, and decisions



Professionalism

Maintaining a high standard of conduct when dealing with taxpayers and property owners

4 “C” CUSTOMER CARE



**Customer
Experience**



Conversation



Content



Collaboration

Customer Experience

Generate and manage great experiences

Conversation

Drive positive conversations
Facilitate and participate in discussions
Real and meaningful conversations

- Helpful to taxpayer
- Understand issues
- Offer solutions

4 “C” CUSTOMER CARE

4 “C” CUSTOMER CARE

Content

Communications and information
you present to taxpayers

Orchestrate content to generate
conversations in specific directions

Create content sharing strategies

Collaborations

Exceptional taxpayer service

- Helps create experience

Taxpayer involvement

- valued
- appreciated



Proactive

Personalized

Convenient

Competent

These factors have the biggest influence on the taxpayer overall experience and satisfaction

4 CUSTOMER SERVICE PRINCIPLES

PROACTIVE



BE
PROACTIVE

- Take initiative - Don't wait
- Address major issues ahead of time
- Anticipate taxpayer needs before even having to tell you
- Head off complaints, help now!
 - Saves time and keeps taxpayer satisfied
- Reach out to taxpayers before NOA's go out when revaluations occur.

When you have to react to problems, it can often be difficult to find quick solutions satisfying to both parties.

PROACTIVE VS REACTIVE



Department of Revenue

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- Set up Taxpayer Support Sessions
- Offer information/supporting documents when you are aware of changes in market conditions which affect value.
- Set up Easy to Use Taxpayer Support Sections on Website, FAQ's, informational documents, etc.



- Sometimes excellent customer service experiences means letting people help themselves.
- Track top issues or taxpayer concerns-
write help center articles based on these topics
- Expand on these yearly and update

qPublic Sales Tool

PERSONALIZED



- Create an emotional connection
 - Introduce yourself
 - Use their first name
 - Re-Introduce yourself
 - It de-escalates a stressful situation and creates a human connection.
- Know your taxpayer's property
 - Ask questions!
 - Verify information.
 - Ensure accuracy of records.

Do not make taxpayers repeat themselves!

CONVENIENCE



A hand holding a white chalk marker is writing the word 'TIMELY' on a dark chalkboard. The word is part of a list of customer service attributes written in a serif font. The letters 'C', 'F', 'S', 'I', 'P', 'P', 'P', and 'T' are in white, while the letters 'U', 'R', 'I', 'N', 'O', 'O', 'I', 'S', 'E', and 'Y' are in a gold color. The words are stacked vertically: CUSTOMER, FRIENDLY, SUPPORT, INNOVATIVE, POSITIVE, PRECISE, and TIMELY.

CUSTOMER
FRIENDLY
SUPPORT
INNOVATIVE
POSITIVE
PRECISE
TIMELY

- Preferred Channel of Communication
 - Person, Phone, Email, Online, Etc.
- Speed
 - Quality and Timely Assistance
- Make it easier than the taxpayer expects
 - Put yourself in taxpayer shoes and look for ways in which dealing with you could be easier

COMPETENT



- Know your information- what occurred in the market, schedules, etc.
- Know what you can do!
- Know the next steps in process
- Provide training for your employees- Keep informed
 - More confident on the job
 - Create a positive experience for everyone involved in the process
 - Well trained employees are going to be better equipped to provide taxpayers with an excellent customer service experience



The eight laws of learning are
explanation, demonstration,
imitation, repetition, repetition,
repetition, repetition, repetition.


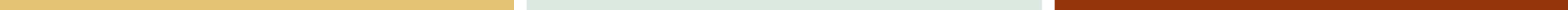
— *John Wooden* —



Developmental Skills


ALSO KNOWN AS SOFT SKILLS

- Empathy
- Problem Solving
- Effective Communication
- Active Listening
- Technical Knowledge
- Patience
- Tenacity
- Adaptability
- Resourcefulness
- Positive Attitude
- Attention to detail
- Collaboration
- Conflict Resolution
- Creativity
- Critical Thinking
- Decision Making
- Emotional Intelligence
- Friendliness
- Negotiation Skills
- Open Mindedness
- Patience
- Persuasion
- Process Knowledge
- Time Management
- Understanding Body Language
- Writing Skills



Anyone can develop these skills and build taxpayer trust and loyalty as well as foster stronger working relationships.

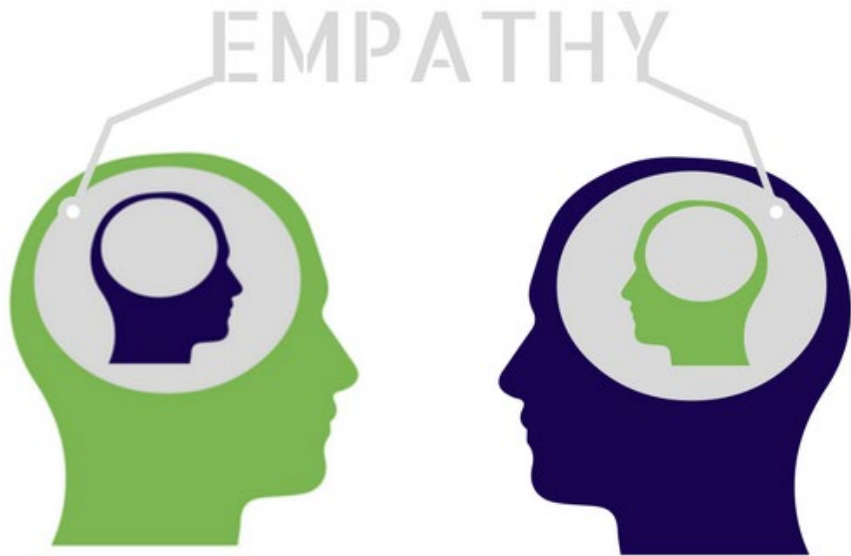
It is likely your employees already possess some of these skills and may just need practice to develop or sharpen them.





EMPATHY

EMPATHY



- Ability to understand another's emotions and perspective to fulfill their needs.
- Read cues to anticipate what taxpayers want- *see their point of view*
- Relating to the taxpayer provides a great customer experience
 - Be driven to help taxpayer- put taxpayer at the center (*customer centric*)- do not see as an annoyance to handle

This is crucial!!!

Empathy Enables Cooperation

Empathy is at the core of trusted relationships.

“Employing empathy in customer relationships means you can understand and respect how the customer is feeling, even if you feel differently. When people feel empathy from you, they become highly cooperative.”





PROBLEM SOLVING

Key to
Customer
Service



Employee
needs to be
able to figure
out why the
taxpayer came
with the issue
and how/if
can be fixed.

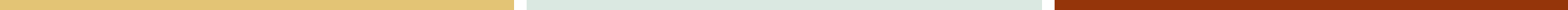


Solving the
problem may
require patience,
lots of respect,
which may not
always be
reciprocated as
the problem is
explained,
process is
resolved.



Possess
knowledge to
resolve issues
if applicable or
explain
process

PROBLEM SOLVING



How to solve an issue
is just as important as
providing a solution-
*take responsibility for
the taxpayer's care*

***Front line of
satisfaction***



UNDERSTAND THEIR PERSPECTIVE

Putting yourself in their shoes without judgement, without thinking well you should have done “this”

Connecting with their emotions to understand their situation and where taxpayers are coming from.

Remain curious.

Ask questions. – Questions help make informed knowledgeable recommendations

OUTCOME



Treat taxpayers kindly

Assist taxpayer in understanding the process

“I understand how frustrating this can be. I have been in a similar situation myself. Let me see if I can help explain the process and make sure we have everything correct in our system”



RESOURCEFULNESS

RESOURCEFULNESS



Finding innovative and time efficient ways to solve problems can decrease time with each taxpayer-
increasing number of taxpayers you can help in a day



Becoming familiar with different specialties



Develop creative approaches to problem solving



TECHNICAL KNOWLEDGE

TECHNICAL KNOWLEDGE



**FAMILIARITY WITH
TECHNICAL AND
INDUSTRY KNOWLEDGE**



**HELP TAXPAYERS MAKE
INFORMED DECISIONS**



**UP TO DATE ON LAWS,
REGULATIONS, POLICIES,
ETC.**

KNOWLEDGE GAP

A common mistake in customer service training is to stick to the “**WHAT**” level

A truly helpful employee is one whose knowledge reaches the “**WHY**” level

THE POWER OF *“WHY”*

The ***WHY***
is a powerful
weapon in
customer service
due to the power
behind the
justification



TENACITY

TENACITY



Persistent throughout a difficult situation



Get job done thoroughly and accurately

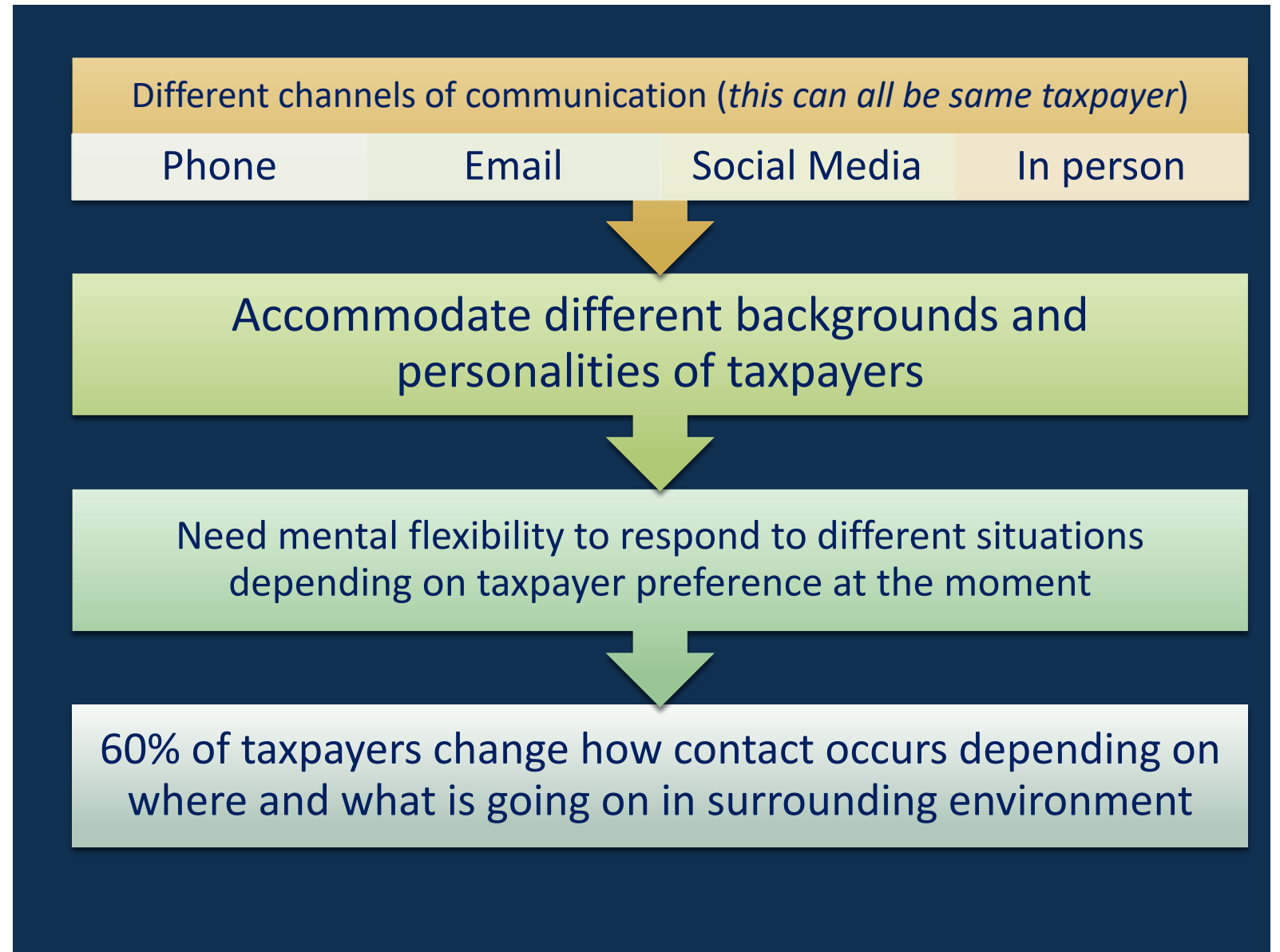


Taxpayers appreciate it when service professionals walk through process



ADAPTABILITY

ADAPTABILITY





POSITIVE ATTITUDE

POSITIVE ATTITUDE

- Naturally, friendly disposition
- Upbeat personality
- Meet the taxpayer where they are
- Empathize with their situation
- Create positive dialogue

STAY
POSITIVE

A photograph of a wooden pier or dock extending into a body of blue water. The pier is made of weathered wooden planks and has several white cylindrical posts along its edge. The text 'STAY POSITIVE' is overlaid in large, white, sans-serif capital letters across the middle of the image.

POSITIVE ATTITUDE

- Negative attitude leads to poor reputation.
- Any time an employee engages a taxpayer they are representing the TAO and should be exercising good customer service skills.
- Face of the TAO
- Always thank taxpayer for their patience and understanding.





CHARISMA

CHARISMA

Want to interact

If likeable people want to interact

Presence- Be present in conversation

People feel heard and important

Assures taxpayers listened to

Power- Being able to change something

Gives taxpayers feeling issues will be taken care of

Warmth- Having the best intentions

Wish the best for the person you're interacting with

Similar to compassion

Taxpayers come to you-This only works if taxpayers trust your expertise.



PATIENCE

PATIENCE



- Patience comes in handy
 - Angry, resentful, insulting or rude taxpayers
 - Frustrated
- Heated argument with taxpayers can ruin reputation
- Practicing patience can help deliver positive customer experience
- Your presence and actions can prevent making a bad situation worse
- Don't simply try to deal with taxpayers as quickly as possible- ***take time to fully listen, understand and assist***

**Stay calm-
taxpayers are
frustrated
not at you
at the
situation-
venting**



CAN YOU BE TOO PATIENT WITH TAXPAYERS?



Some talk beyond the point of productivity.

You need to combine patience with verbal communication skills to guide the conversation



SELF CONTROL

SELF CONTROL



- Remain under self control- even when taxpayers do not
- Always remain respectful
- Remain calm when attacked
- Positive when faced with pessimism
- Professional when a taxpayer gets personal
 - Few consequences when a taxpayer blows up at a customer service representative
 - Consequences when not having self control when interacting with a taxpayer can often be irreparable

APOLOGIZE

Even though you have done nothing wrong- it de-escalates situations

“I understand you’re upset about this situation, and I apologize. I really want to help. Let me see what I can do. Thank you for being patient with me.”



KNOWING WHEN
TO WALK AWAY
IS WISDOM.



COMMUNICATION SKILLS

EFFECTIVE COMMUNICATION

**Communication
is the Key to
Success**



**Dynamic process with each
person sending and receiving
messages**

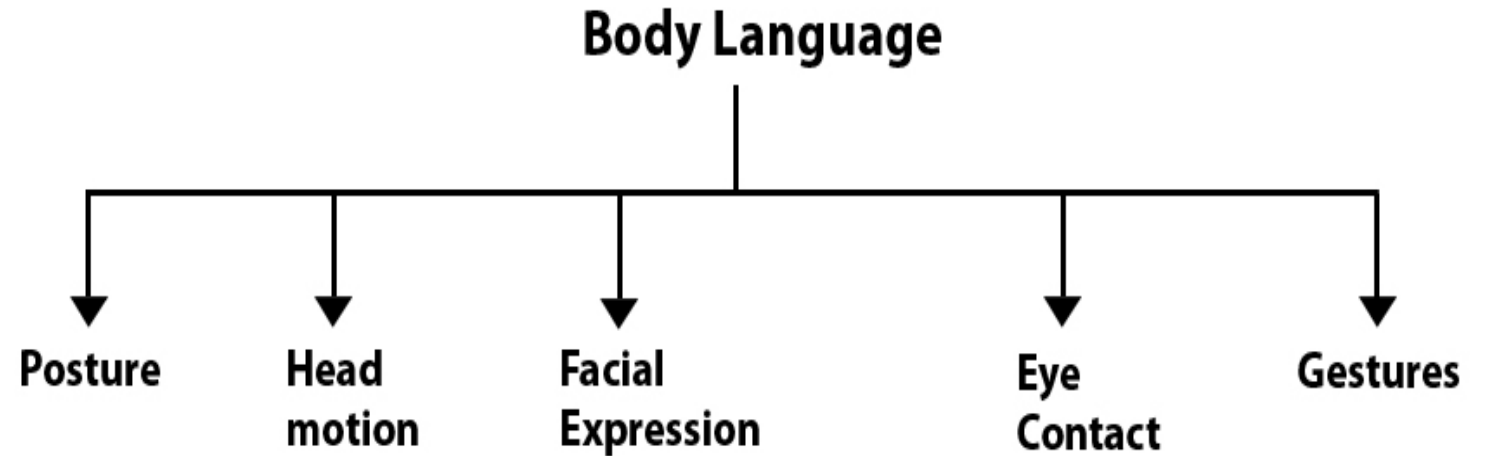


Can occur in many forms

BODY LANGUAGE

Respond quickly and cheerfully

Be positive, refrain from mumbling, crossing the arms, or looking bored



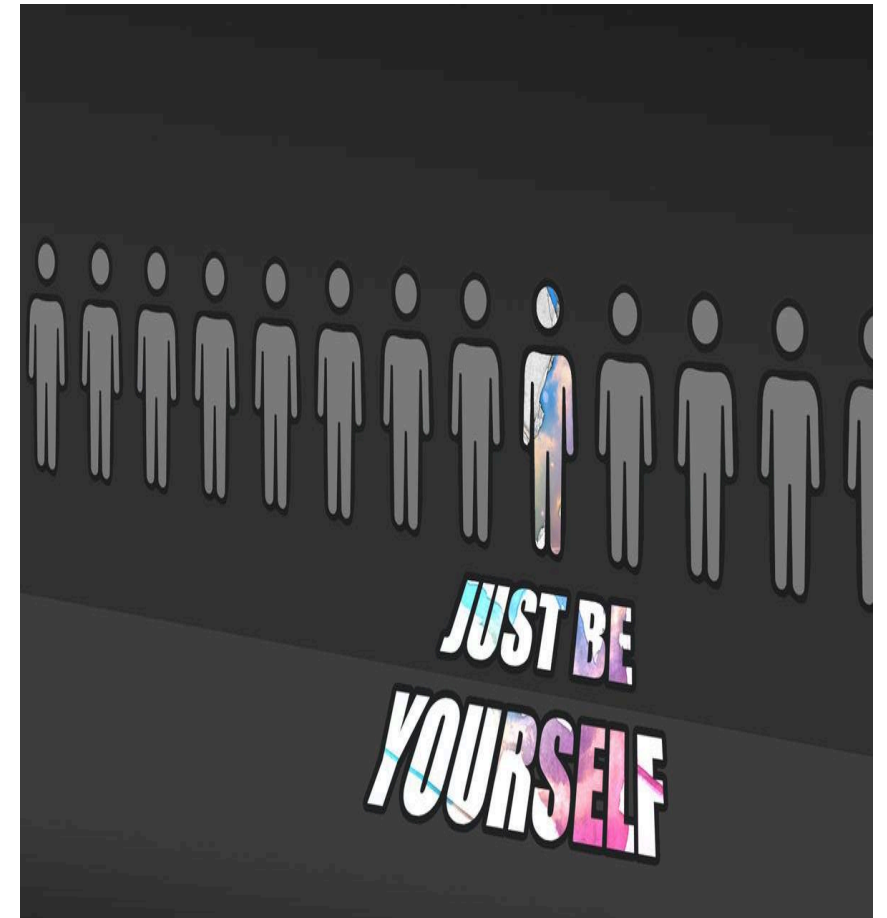
Features of Body Language

BE YOURSELF

Set the tone in a low-profile way which does not put your personality and performance center-stage.

Be yourself. It takes less of your attention and comes across as real.

Ultimately, it is about your mindset, not external performance.



EFFECTIVE COMMUNICATION



**EDUCATE DON'T
DICTATE**



**EXPLAIN PROCESSES,
PROCEDURES, LAWS,
RULES, REGULATIONS,
ETC.**



**TAXPAYER SHOULD HAVE
ENOUGH CONFIDENCE
THE JOB WAS
COMPLETED CORRECTLY⁷¹**

SOME REASONS YOU MAY STRUGGLE TO COMMUNICATE WITH TAXPAYERS



ACTIVE LISTENING

Requires a listener and a speaker

Take the time to truly understand the taxpayer issue so taxpayer knows you are paying attention

People tend to “*evaluate*”

Respond in a way making the taxpayer feel heard

LISTEN FIRST

Acknowledge their concerns.

Acknowledging means showing you've understood the taxpayer, what the taxpayer wants, and how taxpayer feels, without judging taxpayer or the situation.



Hearing is listening to what is said. Listening is hearing what isn't said.

Simon Sinek

quote fancy



You can structure the conversation to help people talk, listen and think

Give taxpayers the attentiveness required while processing and addressing their concerns

Navigate challenging conversations/situations



OARS

Open-ended questions

Acknowledge

Reflect

Summarize

Allows us to deliver on value proposition

EFFECTIVE COMMUNICATION

- Tone
 - Attitude
 - Keep a calm, level voice
 - Open minded new ideas
 - Provide constructive feedback with the purpose of improvement
 - Avoid defensiveness and aggression



CHOICE OF WORDS

“With” not ***“to”***

POSITIVE LANGUAGE

THE POWER OF POSITIVE LANGUAGE

- Despite taxpayers' anger, frustration, unpleasantness, personality, etc. – stay positive
- Injecting positive language suggests you're glad to assist and want to work with the taxpayer
- Keep conversation upbeat and neutral
- Steer conversations toward positive outcome with use of positive – ***don't focus on the negative***
- Focus on the solution

Always thank taxpayers for their patience and understanding- even if it may not have been completely visible

Positive alternatives to negative language for customer service

Instead of ...

"I don't know ..."



Say ...

"Great question, I will find out."

"I can't ..."



"What I can do is ..."

"You'll have to ..."



"Would you mind ..."

"Calm down ..."



"I understand why you feel that way ..."

"That's not our fault ..."



"I apologize for the frustrating situation ..."

VERBAL AFFIRMATIONS

I understand

Yes, I agree

I know what you mean

I hear you

This makes sense



A simple agreement
goes along way
toward
de-escalating
tension

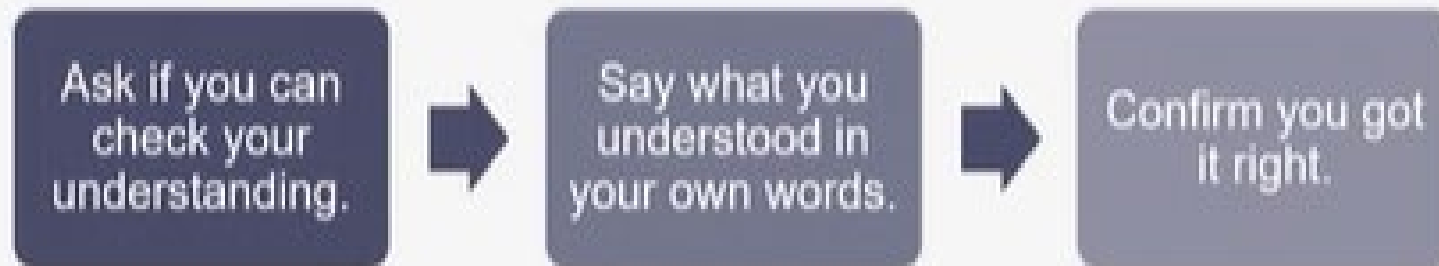
Now since you have allowed the taxpayer to provide some of their concerns, you may begin answering some questions.

- *What's been happening in the market which initiated a change in assessment?*
- *What matters most in valuations?*
- *What's at stake for your office when the DOR does their Digest reviews and consequences?*
- *Consequences when DOAA Study doesn't meet state mandates?*
- *Penalties and/or withholdings of state grants?*
- *What makes you want to resolve this?*

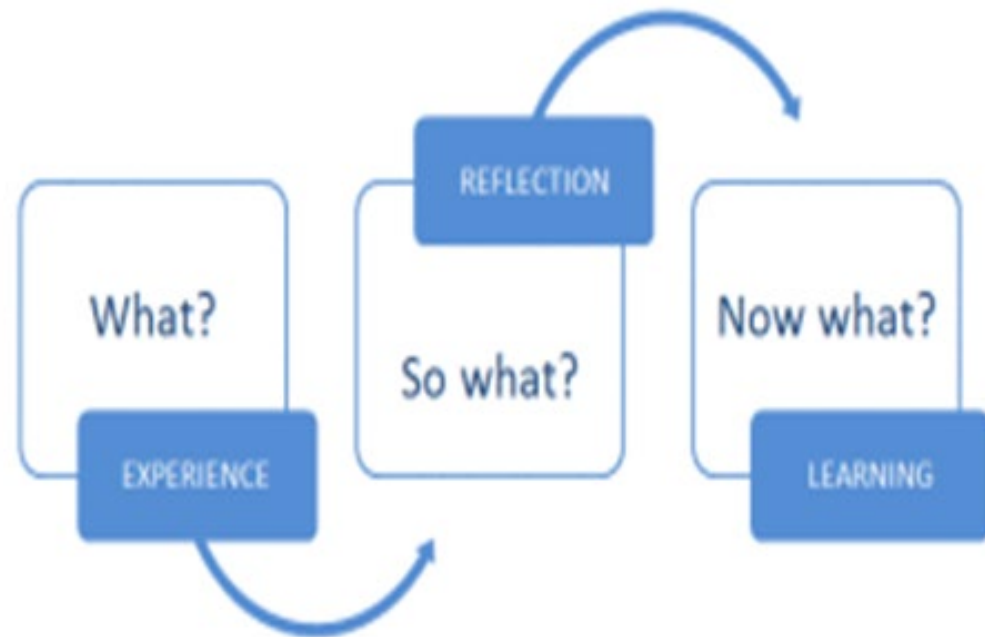
STRUCTURING THE CONVERSATION

Paraphrasing Sandwich

Reflecting and acknowledging to check for understanding



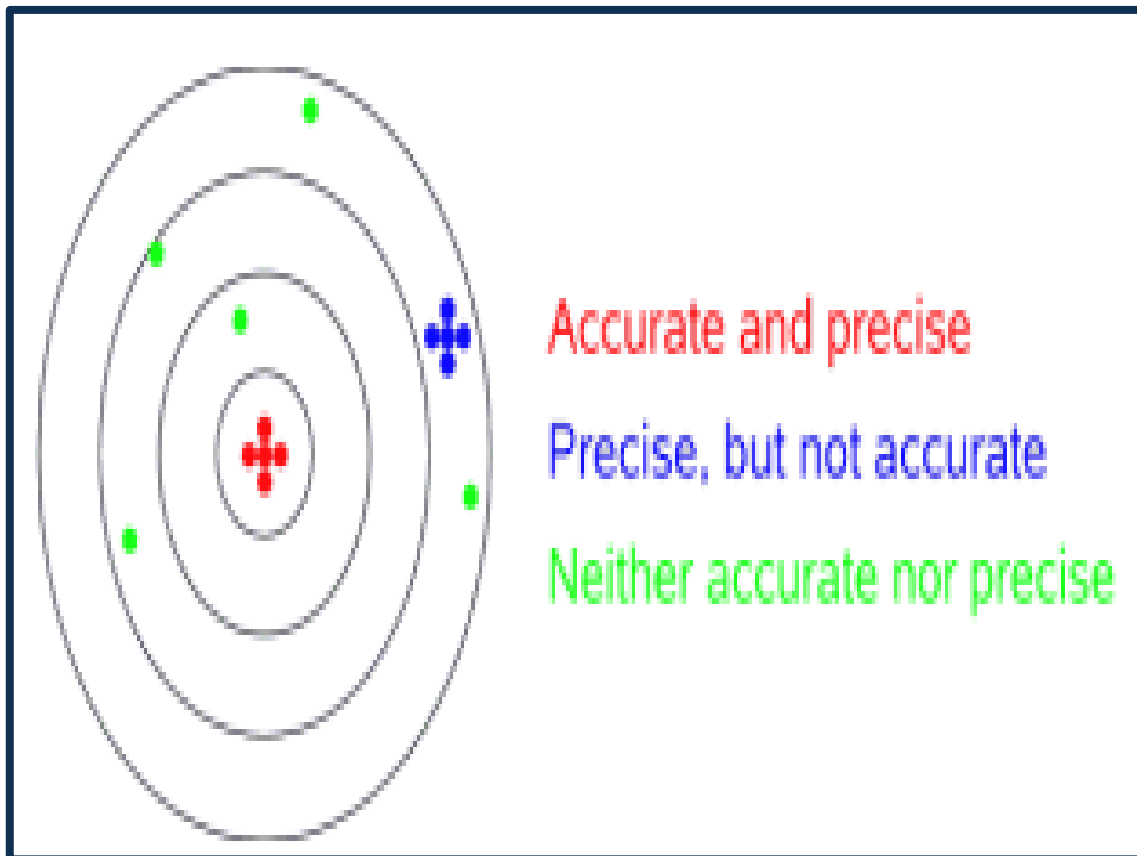
REFLECTING BACK



Adapted from Boud et al (1985)

Reflecting back means restating the main points someone has made, translated into neutral language, avoiding any emotional context.

What's important is being able to edit, reframe, organize, and test what you hear.



It should always be coupled with looking at the taxpayer for confirmation or verifying your reflections are accurate.

Use neutral language and tone so as not to put the taxpayer on the defensive.

REFLECTING BACK

Shows:

- Attentiveness
- Understanding
- Interest in resolving issues
- Ensure you understand the situation

HOW TO RESTATE WHAT THE TAXPAYER SAID:

Use the taxpayers' words to signal you are ***not minimizing*** their frustrations.

Look for opportunities to “***modify***” their language to something less “***loaded***” and more tangible.

Keys to Empathetic Conversations

Getting your understanding in check

Repeat their words



Capture their words and repeat them to be sure you've understood.

Reflect their feelings



Pay attention to their feelings and reflect them back.

Roll with resistance

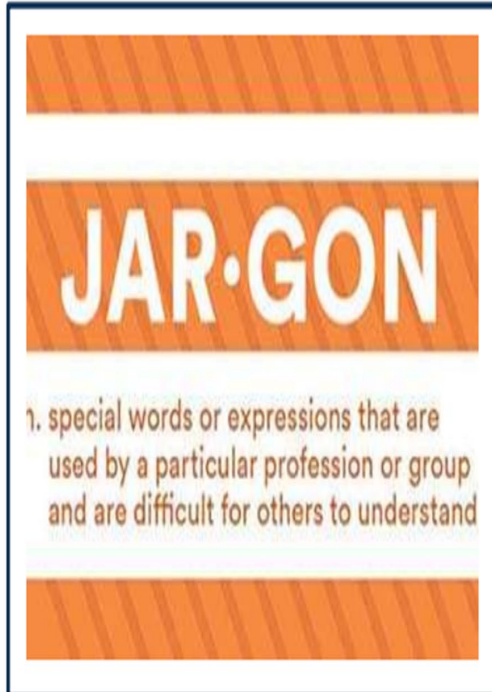


If you become defensive, the other person may also become defensive.

EFFECTIVE COMMUNICATION

Use clear and concise language

- Clarity- using terminology the other person understands, as well as articulating their words and expressing them in an appropriate manner



Jargon will almost always cloud communication and cause problems when speaking to strangers.

(Keep in mind, most people are embarrassed to ask what you mean)

Jargon can even be confusing to your coworkers. Use these terms with extreme caution from now on.

“But”

A BAD WORD

“BUT” IS A GIANT OBSTACLE



*I hear what you're saying , **but**....*

- This basically means you do not agree with taxpayer
- Whatever you said before “but” might as well have never been said

The same as saying

*“ I agree with you, **but** I don't”....*

*“I hear what you're saying, **but** I don't”*

INSTEAD...

REPLACE WITH “AND”



“and” is an **acknowledgement-**
not an agreement

*I hear what you’re saying,
and this is true, too....*

*This is a major aspect of
reflective listening*

The Power of Because

People are 57% more likely to say “yes” when the request includes a “because.”

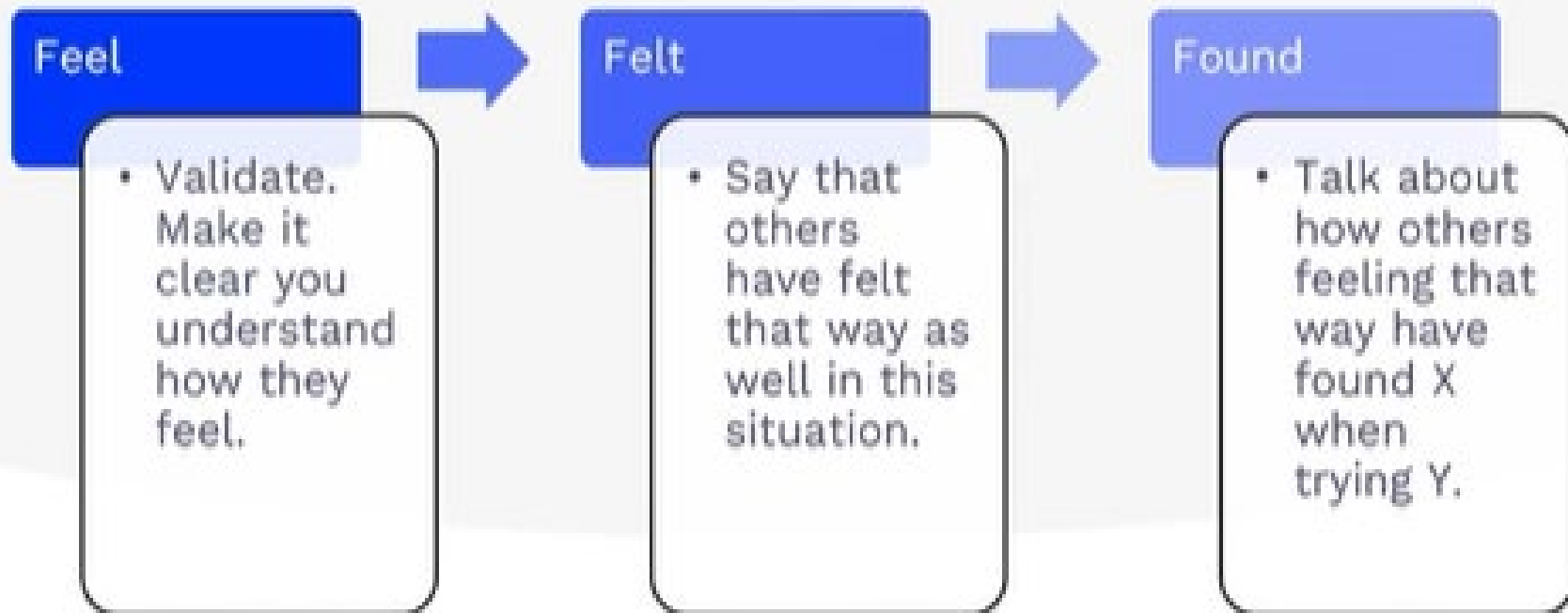
Researchers found that this was true even when the reason was not very compelling (“because I have to make copies”).



Weinschenk, Susan. "The Power of the Word 'Because' to Get People to Do Stuff." *Psychology Today*, 15 Oct. 2013,

Feel - Felt - Found

Handling objections and resistance



ASK

***WHAT WOULD A SUCCESSFUL
RESOLUTION LOOK LIKE TO YOU?***

Be quiet and listen



*Is this something you can do?
Is there something else you can
offer?*



***“Let me think on this
for a minute....***

***I will be back in just a
minute.....”***



1

Take responsibility

- Respect ownership of an issue

2

Be honest and transparent

- Show taxpayers you are doing what you can to resolve issues

3

Thank taxpayers

- Bringing issue to your attention and thanking taxpayer for it will build rapport
- Acknowledge their patience

BUILD TRUST AND RAPPORT



So, now what?

Realistic Expectations

Define a scope which is realistic.

What decisions you have the authority to make so you provide taxpayer with realistic expectations.

Only promise taxpayer what you can do.



PERSUASIVE SPEAKING

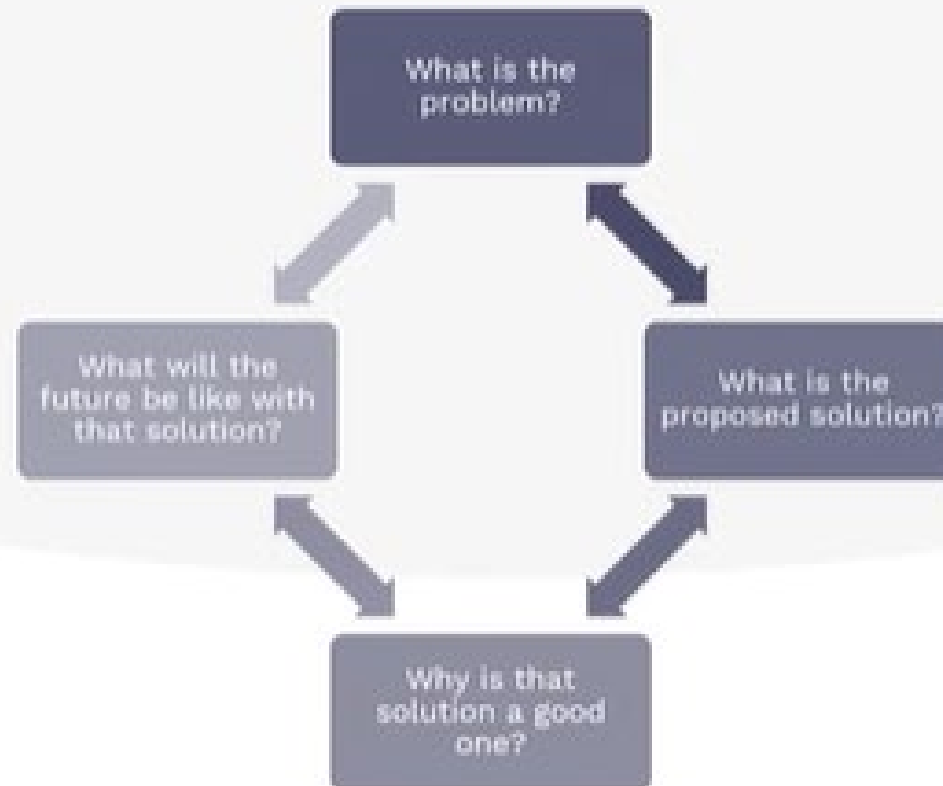


Best individuals turn problems into solutions

- Speak confidently
- Stay positive
- Offer kind, compelling arguments
- Lead to logical understanding

Structured Persuasion

Following the decision-making cycle





**HOW CAN YOU DO
THIS?**

FOCUS ON THEIR INTERESTS

Immediate, and specific to the situation:

"I need a supervisor who can handle my concern and fix this. I want to speak with your boss."

Long-term:

"I was raised here. I want to raise my kids here and retire here. I want to be able to afford my taxes. By raising taxes, you are pushing me out of my home."

Public, visible:

"Our community will suffer until the taxes are brought down. You are catering to out of towners who aren't even going to live here, its just an investment property or vacation home for them."

FOCUS ON THEIR INTERESTS

Private or secret:

"I can barely afford my expenses now. I don't want to get taxed out of here, but I won't be able to afford living here until my taxes are lowered."

Emotional/ social:

"I want to do things my way. I want to be in charge."

NOTICE INTERPRETATIONS, ASSUMPTIONS

Participants often present their interpretations and assumptions as facts.

Generalizations about character, i.e., jumping from

"This is what William did" → "William is incompetent and wrong"

Generalizations about the situation,

"If you'd just do X, the problem would be solved."

"The whole County is mad at you, it's not just me."

NOTICE INTERPRETATIONS, ASSUMPTIONS

Worries (predictions),

If the taxes on my property continue to rise, I may lose my property. We can't pay our bills. I won't be able to afford it anymore. I should be grandfathered in and not taxed on people moving in and paying ridiculous amounts for their properties. If they get away with this, they'll take advantage of us again and again.

Mind-reads.

Assumptions about what other people think, feel, or intend, e.g., jumping from

"This is what William did" → to "William did this to raise taxes."



Ask clarifying questions.

Zoom in for examples and factual details.

“I’m showing you have a finished basement, is this correct?”

Zoom out to put something in context.

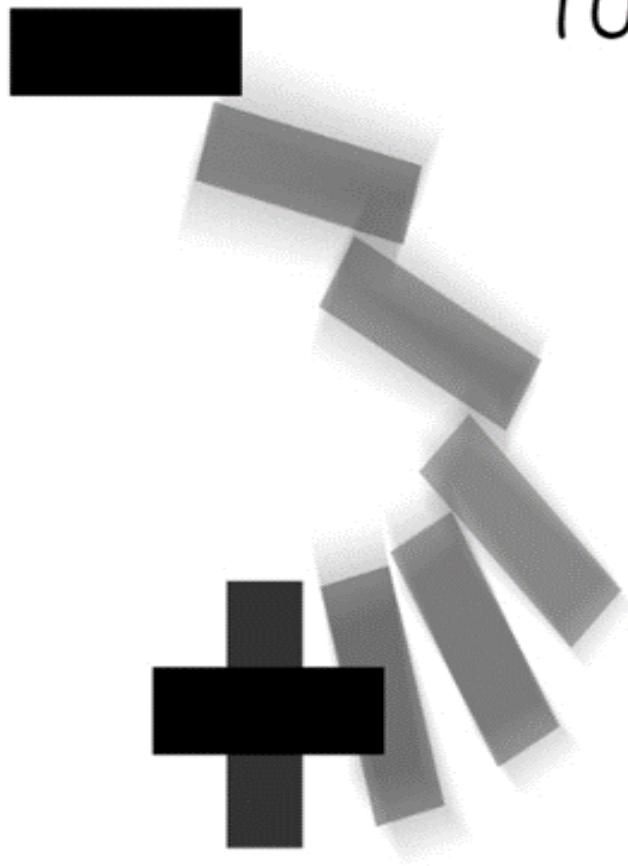
“This policy/schedule applies across the county, where you aware of this?”

TURN **NEGATIVE**

INTO

POSITIVE

BY ROTATING YOUR PERSPECTIVE



FLIP IT- OUTCOME FOCUSED INTERESTS

Past & present → Desired future. Frame the interest as conditions they hope to create, rather than complaints they have about the past or present.

“While in the past, we had several improvements which were not being taxed correctly, and through the hard work of our appraisal staff, we have now ensured not only are all improvements being taxed but they are also being taxed uniformly.”



FLIP IT- OUTCOME FOCUSED INTERESTS

Negative → Positive. Frame the interest as a benefit, a hope, as what people *can* have or do, rather than what they can't.

“Our appraisal staff has worked efficiently in ensuring each property is taxed correctly, equalizing each taxpayer's proportionate share and this effort may lower the millage rate, thereby reducing the overall tax amount for each taxpayer.”



ZOOM IN: FROM A BROAD INTEREST → TO MORE SPECIFIC



Broad interests are useful for creating a spirit of cooperation.

By zooming in you are getting the parties thinking more concretely about how their specific interests would actually play out.

“I understand you feel like your property is being taxed differently than your neighbors. Let’s review your property and make sure all the information is correct and go from there.”

ZOOM OUT: FROM A SURFACE INTEREST → TO MORE ENCOMPASSING



Zooming out allows for longer-term, overall solutions. Use this “wide angle” when the taxpayer is hyper focused on particulars or when fixing immediate problems won’t change the root of the issue.

“Let me show you our residential building schedule, which applies to the entire county, and the different components which add up to your replacement cost new.”

CLEAR UP MISINFORMATION, FILL GAPS




Quite often, participants discover significant misunderstandings about the Ad Valorem Taxation process, especially about the other parties' reasons for valuing with the method they did.

Rely on your experience and qualifications

How to Say No

Without gaining a reputation



Start with your reasons for saying no.

Say something empathetic.

Be helpful in some way, even if it's small.

*"I know you are looking for... I know this is disappointing to hear **and** I want you to know I would love to help you in any way I can, **and** I am glad we were able to ensure we made sure your property was taxed appropriately. I am sure you understand I have to be uniform and consistent with other taxpayers, it is only fair they pay their proportionate share as well."*

BEST PRACTICE

SET CLEAR NEXT STEPS



Communicate exactly how you plan to fix the issue



What you'll do for taxpayer right away



What comes after



When taxpayer can expect a follow up or resolution



**Set customer expectations by telling taxpayer next steps
and involving taxpayer in the process**



UNAVOIDABLE

Navigating Emotionally Difficult Situations

Navigating one storm
builds courage for the next.



TAXPAYERS COULD BE VERY MAD WHEN GETTING TO YOU BECAUSE

- *They have been waiting longer than anticipated for a response*
- *They think they wont like your answer*
- *They have had to repeat their information multiple times to different people*
- *They have had one or more bad customer service experiences with your office*
- *They have an incorrect expectation of the level of support they are entitled to or misinformed on the Ad Valorem taxation process and laws, rules and regulations.*

Remind yourself the taxpayers are not “difficult people.”

Taxpayers are “people in difficulty.”

Interrupt. Make eye contact and use their names.

Hang on a second

I’m not following

Let me interrupt you for a moment, etc.



The Know-
It-Alls



The
Passives



The
Dictators



The “Yes”
People



The “No”
People



The
Grippers

ANGUISH, CRYING

01

Take tears in stride.

02

Pass the tissue box.

03

Sympathize with the taxpayer in a general way.



NEW, UPSETTING INFORMATION

Ask	Ask if this is new information to taxpayer.
Gauge	If taxpayer says yes, gauge their reaction, or ask for their thoughts.
Give	Give the taxpayer time to absorb the new information, comment, or even ask a question.



THIS IS
BRAND NEW
INFORMATION!

ANGER

***Taxpayers
are angry and
want to be
heard***



**Folks want to be listened
to, they want to be heard.**

Erik Qualman

 quote fancy



Acknowledge the taxpayer's frustration, then ask for information.

Make sure you give full attention and concern to the taxpayer.

ACCUSING YOU



It would not be unusual for the taxpayer to accuse the Appraiser/Assessor.

Take this in stride and continue.

ATTACKS, DISRESPECT, NAME CALLING



You do not have to allow this type of behavior to go on.

Once things are calmer, you might try to raise topics which could build cooperation.




Be grateful you were accused out loud, because now you have opportunity to address the problem (whether or not it has much to do with you).

"Thank you giving me this feedback."

Express regret

"I apologize for your frustration. I am going to do everything I can to address your concerns."



While the taxpayer may still be
unhappy, at least they have
learned more about the process
and where their values were
derived.

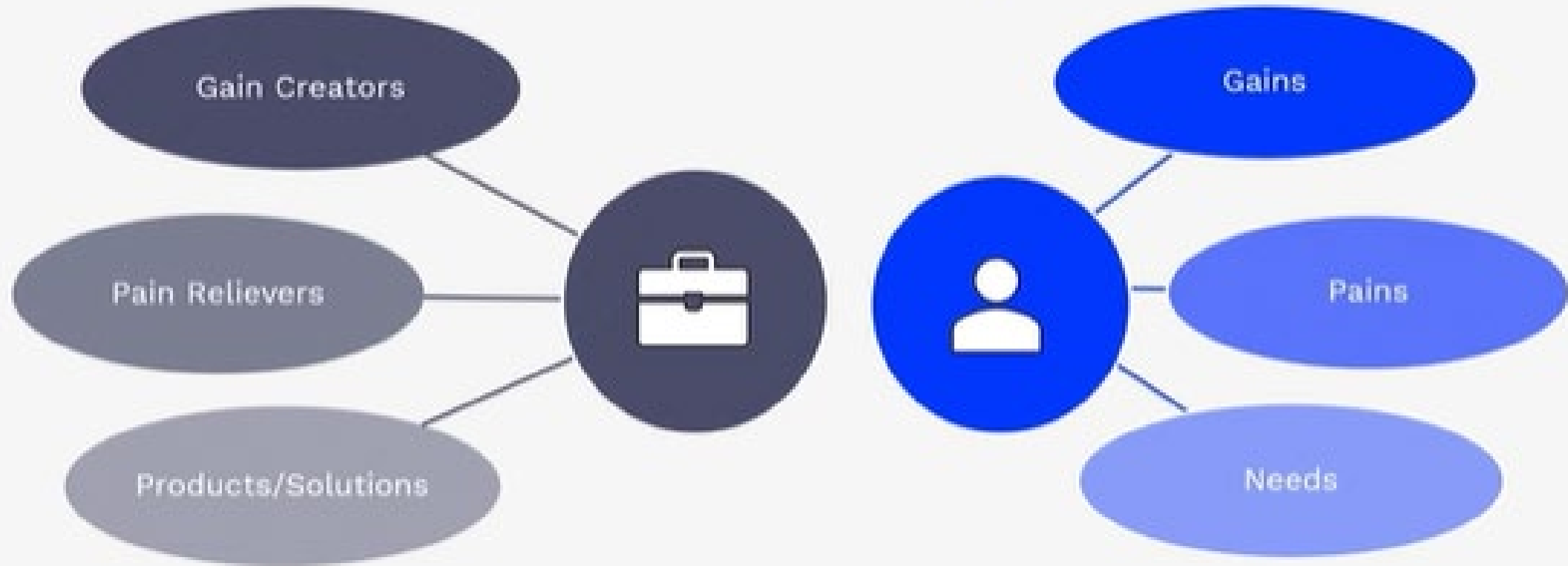
Even when there is no appeal resolution, the emotional charge of the dispute may lessen once people have had their say.

Taxpayers can at least walk away with a more informed and realistic picture of the situation and make their next decisions from this vantage point.



**Phase I
Connecting**

The Relationship



**WHAT CAN YOU
DO?**

Set your employees up for success

- Clear guidelines and expectations
- Examples of what great service looks like

Know the information
Staff meetings over information

Have a knowledge base
Cross Training

Ability to handle difficult taxpayer issues

- “Mock” interaction sessions
- Training and coaching exercises on how to deal with irate taxpayers and handle uncomfortable situations

EMPLOYEE UPSKILLING

KEY TAKEAWAYS

- Remain calm
- Maintain a positive attitude
- Keep communication professional
- Practice active listening
- Give taxpayer time to talk
- Understand the taxpayer's point of view
- Assess their needs
- Find a workable solution
- Speak softly but confidently
- Provide an exceptional customer service experience

HOW TO DEAL WITH DIFFICULT TAXPAYER SITUATIONS



QUESTIONS?

Christina Owens

Compliance Specialist Supervisor

470-698-5524

Christina.Owens@dor.ga.gov

