



## Maryland State Department of Assessments and Taxation FY17 Customer Service Annual Report



*SDAT Assessor Karen Tanzell receiving a Governor's Citation for her outstanding customer service*

On behalf of the Maryland State Department of Assessments and Taxation, I would like to thank Denise Herndon, Corbett Webb, and Candice DeFalco for their contributions to the Department's customer service initiatives and in preparing this report.

~Michael Higgs, Director

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## FY17 Highlights

In FY17, Governor Hogan and Lt. Governor Boyd Rutherford presented Governor's Citations to two members of our outstanding team:

- Ella McDaniel at a State House Press Conference ceremony.
- Karen Tanzell at a cabinet retreat in Carroll County.

In FY17, our Department utilized new tools and customer feedback to provide better customer service and recognize our employees:

- Designed new customer service feedback cards and placed them in all of SDAT's public areas—2 customer services counters at our headquarters location in Baltimore City and in each of our 24 local offices.
  - 91% of customers who submitted feedback were either "Very Satisfied" or "Somewhat Satisfied," exceeding the statewide agency average of 80%.
- All SDAT employees completed an online customer service training course, which is also automatically assigned to any new hires.
- Designed "SuperStar Shoutout" cards for employees who receive positive feedback.
- Planned two employee-recognition events on the Pride of Baltimore II and held a staff appreciation pizza party.

In FY17, we focused on upgrading technology and Departmental procedures to make more services available online and reduce transaction processing time:

- Expedited and non-expedited document copies can now be ordered online.
- More than 50% of all documents are now filed online, 40% of which occur outside of normal business hours. 20% of MBE viewers are using a mobile device.
- Non-expedited business filings were processed in 28 days on average, which is down from 57 days in FY15.
- 98% of personal property returns were assessed by October 31, which is up from 87% in FY16.
- The average wait time at our customer service counters is 30 minutes, down from 45 minutes in FY15.
- The percentage of calls abandoned decreased from 18% in FY15 to 6%.
- Deadlines for the real property appeal process were set in place so customers know when to expect hearings and final decisions.

In FY17, we developed new ways to provide more information to the community:

- Created email distribution lists to provide general news updates and notify customers of annual deadlines.
- Initiated mail and email campaigns, posted on social media outlets, and participated in entrepreneurship events to advertise the services we provide.

## Recognition Given to Employees

Identifying team members who demonstrate outstanding customer service and capturing positive customer feedback specific to employees has been a key focus of SDAT's customer service initiative. In January 2017, we adopted a new customer service online survey, and by February 2017 we had placed customer service feedback cards (graphic on page 6) in all of our public areas—including in our 24 local offices and at the 2 customer service counters in our Baltimore headquarters. Our Department uses the feedback customers provide to identify what services and procedures we need to update to better serve them. The feedback also provides us with a unique way to recognize and reward our employees who demonstrate extraordinary customer service.

Every positive comment is logged and a feedback summary report delivered to program



KEITH DIACZOK

YOU HAVE BEEN RECOGNIZED FOR



CHANGING  
Maryland  
for the Better

Director  
Department of Assessments & Taxation

Service was excellent. The agent I dealt with, Keith, had all the answers and made the task relatively simple. He guided me through the process over the phone and was very pleasant to deal with.

John: September 2017

managers monthly. Additionally, every positive comment is printed on a “SuperStar Shout-out” card, which is presented to the employee by their supervisor. Approximately 60 of these cards are given out each month and many employees hang them on the wall by their desk. Supervisors also frequently circulate emails applauding a team member for a job well done and—with the employee's permission—posts may be made on SDAT's social media pages, our Intranet site, or in a Department-wide email.

Thanks to the Department of Commerce's offer for other state agencies to use the Pride of Baltimore II, SDAT planned two events to reward employees for their hard work. The first was an Awards Cruise in May 2017, in which SDAT leadership and program managers had the opportunity to recognize those employees who have really gone above and beyond customer service standards. 29 invitations and recognition certificates were awarded to employees in 9 different programs. Our Department had also planned to have a Dockside All-staff Appreciation Party in April 2017 in the center of the Inner Harbor during Light City Baltimore, but unfortunately had to cancel due to the weather and were unable to reschedule before the Pride left the Inner Harbor.



At a State House Press Conference in June 2016, Governor Hogan and Lt. Governor Rutherford recognized Ella McDaniel for her outstanding customer service and



presented her with a Governor’s Citation. Ella is a “front line” employee at our Customer Service Counter in headquarters, where customers come to file hundreds of thousands of business documents every year. Ella is an invaluable member of our team and her recognition in Annapolis was well-earned. She also leads our Department in most positive customer service feedback shout-outs. In May 2017, Governor Hogan also presented Karen Tanzell—an Assessor Supervisor in our Carroll County Office—with a

governor’s citation recognizing her customer service. A picture of that can be seen on the first page of this report.

Many of our employees exemplify the principles identified in the Customer Service Promise, and recognizing and rewarding those employees that do so improves the morale of the entire Department. In FY18, our Department will continue these methods of recognition, while also looking for new, innovative, and more-interactive ways of applauding employees for demonstrating outstanding customer service.

# MD

DEPARTMENT OF  
ASSESSMENTS AND TAXATION

Mail to Headquarters at:  
301 West Preston Street  
Baltimore, MD 21298-3026

## THE CUSTOMER SERVICE PROMISE

Our Department pledges to provide customers with services in the following manner:

**Friendly and Courteous:**  
We will be helpful and supportive and have a positive attitude and passion for what we do.

**Timely and Responsive:**  
We will be proactive, take initiative, and anticipate your needs.

**Accurate and Consistent:**  
We will always aim for 100% accuracy, and be consistent in how we interpret and implement state policies and procedures.

**Accessible and Convenient:**  
We will continue to simplify and improve access to information and resources.

**Truthful and Transparent:**  
We will advance a culture of honesty, clarity and trust.

Completing this survey will help us enhance the information & services we provide.

Thank You

Your feedback is important to us. Please answer the following questions...

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Overall, how satisfied are you with the customer service provided?

Very Satisfied	Somewhat Satisfied	Neutral	Somewhat Dissatisfied	Very Dissatisfied
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please rate our customer service on the following attributes:

	Very Satisfied	Somewhat Satisfied	Neutral	Somewhat Dissatisfied	Very Dissatisfied
Friendly and Courteous	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Timely and Responsive	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Accurate and Consistent	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Accessible and Convenient	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Truthful and Transparent	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

If you would like someone to follow up regarding your comments, please fill out the following contact information:

**Name:**

**Address:**

**Phone/E-Mail:**

**Office Visited:**

**Purpose of visit:**

**Comments:**

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Like us on Facebook at [www.facebook.com/MarylandDAT](https://www.facebook.com/MarylandDAT)



## Leadership Analysis of FY17 and Summary of FY18 Approach

The Maryland Department of Assessments and Taxation's (SDAT) core responsibilities are assessing all real and personal property in the state; approving applicants to receive the homestead, homeowners', and renters' property tax credits; and managing all business filings required for entities to operate in Maryland. These programs are very different from one another, but all three involve significant, and many times in-person interactions with our customers.

That is why two years ago, in conjunction with Governor Hogan's Customer Service Initiative, SDAT committed to a renewed focus on providing improved customer service. In FY16, we implemented our first Department-wide customer service policy in conjunction with new in-house training programs, uniform work hours, dedicated customer service emails and phone numbers, and our first employee recognition ceremony. In FY16, Maryland Business Express—our award-winning business platform—also began accepting filings for UCC and most types of entities online.

In FY17, we continued to build on the progress made the previous year. Our Department implemented new methods for customers to provide feedback and held three events to recognize some of our outstanding employees, two of whom were presented citations by Governor Hogan and Lt. Governor Boyd Rutherford. Our Department was more active in the community—attending and sponsoring job fairs and entrepreneurship events—and we created new mail and email campaigns for contacting our customers and educating them on the services we provide. Finally, In FY17 even more services were made available online, and presently more than 50% of all documents are filed online, 40% of which occur outside of normal business hours.

Our Department is excited about the path we are on and for what the future holds, and in FY18 we are going to continue building on these successes. We are currently determining ways to better utilize customer feedback, and are looking into opportunities for more Department-wide customer service and job-specific training programs. We will continue working with our existing vendors to make more services available online, and are looking into new methods of providing similar services for our tax credits and real property programs. We are also in discussion with various organizations throughout the state on how our Department can partner with them to provide even more information and services to Marylanders. With a continued focus on creating an excellent customer experience, coupled with an increase in services by adopting new technologies, we can make it easier for customers to interact with our Department and do business in Maryland.

## Detailed FY17 Results and FY18 Plans

### Customer Service Survey Results

SDAT is somewhat unique among state agencies in that we not only encourage customers to submit feedback through the online survey, but we also encourage them to fill out customer service cards. There have been various version of these cards over the years but as of February 2017, we began using redesigned cards that were better aligned with the Customer Service Promise and online survey (a graphic is located on page 6). These cards are available in each of our 24 local offices and at the two customer service counters at our headquarters location in Baltimore.

The following table summarizes the customer service responses our Department received in FY17:

	Very Satisfied/ Somewhat Satisfied	Percentage
<b>Feedback from Customer Service Survey Cards</b>	439/466	94.2%
<b>Feedback from Online Customer Service Survey</b>		
Overall, how satisfied are you with the customer service provided?	285/330	86.4%
Please rate our customer service on the following attributes*:		
➤ Friendly & Courteous	223/251	88.8%
➤ Timely & Responsive	222/251	88.4%
➤ Accurate & Consistent	216/251	86.1%
➤ Accessible & Convenient	218/251	86.9%
➤ Truthful & Transparent	214/251	85.3%
<b>Customer Service Feedback Totals:</b>	<b>724/796</b>	<b>91.0%</b>

*\*Metrics for the specific points of the customer service promise were not available until the most recent version of the online survey.*

Our Department is very proud of our results, which exceed the statewide average of 80% for respondents who indicated they were either very satisfied or somewhat satisfied. Additionally, while we are always striving to increase overall satisfaction, we pay particular attention to the feedback comments. All positive comments are logged and used for employee recognition initiatives as discussed earlier in this report. Any time a customer leaves contact information and is either not satisfied with their service or leaves a comment that suggests follow up would be beneficial, a member of our customer service team contacts them immediately. If negative comments are received but there is no contact information, they are still reviewed by program managers. Reviewing these comments can lead to substantive changes in procedures and services provided, a number of which have already been made or are being developed.



One of our main focuses in FY18 will be on continuing to utilize these comments to improve our services and procedures, and sharing the feedback—whether positive, constructive, or negative—with more members of our team.

### Status of Customer Service Training

In addition to routine program-specific customer service training and emailed etiquette reminders provided by program managers and our customer service liaison, In FY17 all SDAT employees completed a customer service training course developed by the Department of Health. In general, the course focused on making employees more aware of the need to strive towards providing outstanding customer service at all times, and how to better think about their actions from the customer's point of view.

This course is also automatically assigned to new employees, and during their orientation sessions our Human Resources team discusses the importance of customer service, provides employees with a copy of the Customer Service Promise, and asks them to sign an acknowledgement form.

In FY18, we plan to utilize in-person customer service training as our primary mechanism for training members of our team, in addition to any training—such as DHMH's—that is available. We are also looking in to purchasing licenses so that our supervisors can take additional customer service and job-specific training lessons, and then pass that knowledge on to their teams.

### Customer Inquiry Response Times and Overall Time-to-Resolution

#### Timeliness of Responding to Customer Inquiries

Our customer service feedback cards are collected from locked boxes in our public areas and are reviewed on a weekly basis. Customer service feedback sent via mail or email is reviewed daily. Once an inquiry is reviewed, in the vast majority of instances a full and final answer is provided within 24 hours, instead of transferring the customer or asking another team member to follow up. If an inquiry is more complicated and an immediate response cannot be provided, our customer service team will send an email to the customer thanking them for submitting their inquiry and confirming receipt of it before sending it to a program specialist for follow up. SDAT's official policy is to respond to all requests within three business days.

One of the reasons for stressing the importance of not transferring inquiries and responding quickly is because our Department has been making a push towards online services, and most inquiries involve information that is publically available through our website. Real property data can be accessed at <https://sd.dat.maryland.gov/realproperty>, business entity filings can be viewed for free at <https://egov.maryland.gov/BusinessExpress/EntitySearch>, and tax credit information can be found at [dat.maryland.gov/pages/tax-credit-programs.aspx](http://dat.maryland.gov/pages/tax-credit-programs.aspx). By using and

directing customers to these three most frequently sought after resources, often times we can respond to inquiries immediately and completely.

### Best Practices

We believe our current practice of responding to customer inquiries is sufficient and satisfactory for our customers. As soon as we receive an inquiry, it is reviewed by staff and in one way or another we acknowledge the customer's inquiry. We strive to handle inquiries very quickly in order to ensure that our customers have a positive experience.

### Plans for Improvement

NIC, Maryland is one of our main vendors and plays a pivotal role in the operation of our Maryland Business Express page. NIC has its own survey where customers can submit more technical feedback. Our Department meets with NIC regularly, and at a June 2017 meeting we discussed ways to share and better respond to customers who respond through NIC's survey. In FY18, we will continue to solidify these procedures to ensure that no customer service inquiries are routed to the wrong program nor fall through the cracks.

### Improving the Customer Experience from Multiple Perspectives

Our Department has made tremendous progress over the past year to improve our customers' experience. For the first time, we mailed 134,000 postcards to homeowners who are likely to qualify for the homeowners' tax credit but have not submitted an application in the previous three years. We have been more active in the community by attending job fairs and entrepreneurship events. Our Department even joined other state agencies in sponsoring and participating in The Basketball Tournament's Day of Giving at Coppin State University, which was attended by dozens of business that committed to create 1,000 jobs and hire 250 people on the spot.

Although mailing campaigns and community outreach play a pivotal role in connecting SDAT with our customers, our Department's two biggest focuses in FY17 were on making more services available online and shortening processing times for customer transactions.

### Making Agency Services Available Online

Whether it is an entrepreneur trying to start a home business, or a corporation in existence for decades, SDAT maintains the paperwork that allows businesses to operate in Maryland. Every year, the private sector offers more and more online services, but the public sector has not moved as quickly in this direction—and as of 2015, neither did SDAT. Two years ago, most charter filing transactions were completed by mail or in-person. If a customer wanted to start a business or reserve a trade name

in Maryland, they had to wait 10 weeks while paperwork was processed. After a business owner filed their annual Personal Property Return, they had to wait 14 weeks for assessors to review the submission.

Today, thanks to a strong push to provide more services online, more than 50% of all documents are filed online, 40% of which occur outside of normal business hours. 20% of our Maryland Business Express viewers are also using a mobile device. In FY16, Maryland Business Express—our award winning online platform for filing business paperwork and requesting document copies—began accepting filings for most types of business entities. In FY17, the ability to order copies of documents was added, and all new document filings and most within the past decade can be viewed and downloaded for free on our website. In January 2017, we also began an in-house scanning operation so that even more documents could be accessible online. That operation is currently scanning in and uploading approximately 16,000 documents and 54,000 pages per month. The availability of these online services enables customers to conduct business with SDAT when it's convenient for them, and results in quicker turnaround, shorter wait times, and fewer dropped calls.

Our Department's goal is to allow all services to be completed online. In FY18, we are planning on allowing resolutions, cancellations, and penalties to be filed online. Customers will be able to choose whether or not they want expedited services, and the more than 200 existing forms used throughout our Department will be updated and consolidated into 50 fillable PDFs. At the same time, we will continue the community outreach and partnerships that are crucial to educating all Marylanders on the services we provide. These initiatives will better connect SDAT with our customers, and will allow us to be more responsive to their demands in a modern environment.

### Processing Times for Customer Transactions

The increased availability of online services has drastically reduced processing times while also freeing up and enabling us to better allocate other resources. Two years ago, it could take up to 10 weeks for document copy requests to be returned, while today the turnaround is 4 weeks. In FY15, reviewing personal property returns could take up to 10 weeks, while today it only takes 5. Business-formation processing time has also been reduced from 10 weeks to 4 weeks and trade name processing time has been reduced from 10 weeks to 48 hours. Over the past three years the number of days to process non-expedited business filings has decreased from 57 days in FY15 to 28 days in FY17. The percentage of calls abandoned has decreased from 18% to less than 6% (for most of the year it is under 5%, but spikes around filing deadlines). The average wait time at our Customer Service Counters in headquarters has decreased from 45 minutes to under 30 minutes, and there is no wait time in our 24 local offices as staff is always available to interact with walk-in customers.

In FY17, our real property division published more than two-dozen new procedures so customers have a better understanding of how property is assessed, and also implemented official deadlines for appeals so customers know when to expect a response. After receiving notice that a property owner is appealing their assessment, our Department will schedule a hearing within 120 days unless the property owner requests a postponement. Following that hearing, our Department will send the appellant a final notice within 60 days of the hearing.

In FY18, due to improved processes and the implementation of additional services mentioned in the previous section, we expect these processing times to decrease even further.

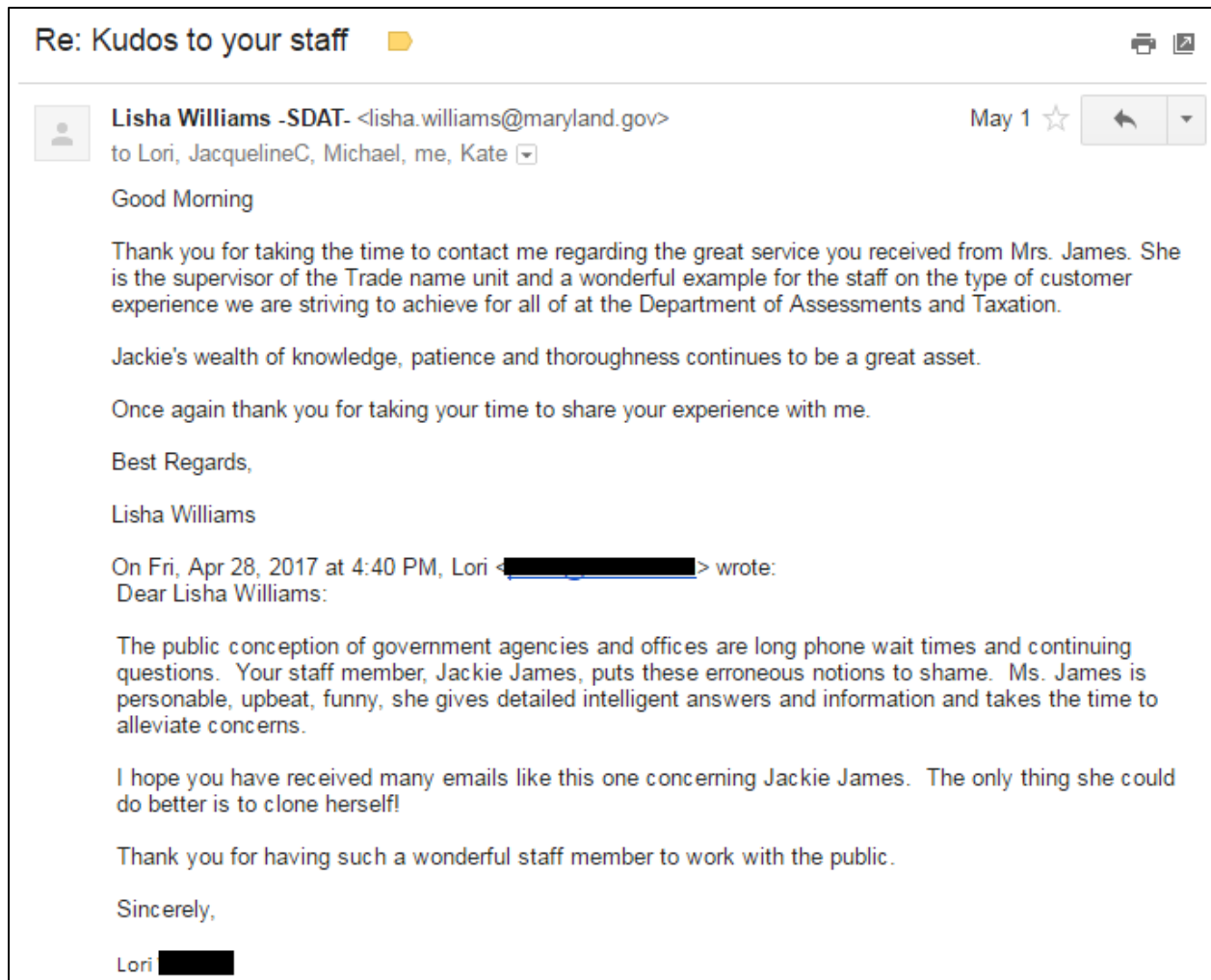
### Adjusting Hours to Meet Customer Demands

We have examined our general business hours of operation and determined that being open Monday through Friday from 8:30 am to 4:30 pm most appropriately serves our customers' needs. In FY16, our Department implemented these uniform work hours as the previous schedule had a wide range of employee start and end times. In our 24 local real property offices, the hours may vary slightly depending on assessor availability, appeals in process, and other considerations. Additionally, by providing more services online, our Department in many ways is open for business 24/7, as evidenced by the fact that more than 40% of business filings occur outside of normal business hours.

### Social Media Usage to Improve the Customer Experience

As our Department has increased the number of services available online, we have also sought new and modern ways to communicate with our customers electronically. We frequently utilize our Facebook and Twitter profiles to post about general news, upcoming deadlines, and other services that our Department provides.

In FY17, we also began creating various distribution lists for our customers, and including sign-up links on outgoing communications (<https://public.govdelivery.com/accounts/MDSDAT/subscriber/new>). Some of the lists created include (1) General SDAT News, (2) Press Releases, (3) Annual Personal Property Filing Deadline Reminders, and (4) Annual Tax Credit Filing Deadline Reminders. Presently, more than 50,000 unique email addresses are subscribed to these lists, one third of which were self-subscribers. In FY18, we plan on creating more lists tailed to our customers' needs and gaining more subscribers. Importantly, this effort goes hand-in-hand with our push to online services—although annual returns can be filed online, only 20% of customers currently do so. Finding innovative ways to educate customers about the online services we provide will improve their experience while allowing our Department to operate more efficiently.



Many SDAT employees exemplify the principles identified in the Customer Service Promise and Governor Hogan's Customer Service Initiative. In FY17, 90% of customers who interacted with our Department felt very satisfied or somewhat satisfied with their experience, and in FY18 we expect that percentage to be even higher.



DEPARTMENT OF ASSESSMENTS & TAXATION