

ESTABLISHING A GOVERNMENT EFFECTIVENESS RESEARCH CENTER

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Submitted to:

Gelila A. Teshome

Contracting Officer

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Submitted by:

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Small Business of 7 years

DUNS – 046424137

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NAICS Codes – 611310, 518210,

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COVER LETTER

Gelila A. Teshome
Contracting Officer
gteshome@oa.eop.gov
Phone: 2023957671

Dear Ms. Teshome,

Visual Bridge, LLC is pleased to submit in response to the above request for information. Per the submission instructions this volume contains information that highlights our company's mission, areas of expertise, and insights into how the GEAR center can improve Government-to-Citizen interactions, improve speed and quality of delivery of services to citizens, reform core IT processes within the Government, and upskill current public-sector workforces.

Your point of contact for this effort is Dr. Dan Green. Dr. Green is a former Fortune 50 Executive, who has conceptualized and operationalized workforce development programs for global organizations, and currently leads organizational change and core process reform for the one of the largest communication transformation efforts at the Internal Revenue Service.

Our mission is to help Government agencies deliver services to citizens faster, through deployment of technology and business solutions that reshape human experiences. Our core expertise is in:

- Secure Communications Platforms
- User Experience, User Design and Human Factors
- Process Transformation and IT Change Management

We have real world experience in increasing Government effectiveness and have acquired both qualitative and quantitative research data to show which services truly enhance Government effectiveness in the realm of secure communications.

We would be delighted to meet with you to discuss the information contained in this response in more detail. If you have any questions or need additional information, please contact me directly at 703.981.8013 or at Dan.Green@VisualBridge.net.

Sincerely,



Dan Green, PhD
Vice President
Visual Bridge, LLC
703.981.8013

EXECUTIVE SUMMARY

Visual Bridge continues to have tremendous success at the Internal Revenue Service in the areas of increasing Government efficiency, boosting citizen engagement with the agency, saving money, and upskilling the Federal workforce. We believe this knowledge is of value to the GEAR Center. Our unique story consists of two unique parts; the **technology** and our **methodology**.

Visual Bridge currently leads the Taxpayer Digital Communications (TDC) program at the IRS, which is a program that uses a cloud-based Omni-Channel communication platform to digitally engage with taxpayers in the form of secure messaging, web chat, artificial intelligence automation, and many others. We have a unique change management and technology deployment approach that is a blend of ITILv3, Six Sigma, Agile, and Kotter methodologies. To date, we have realized test pilot successes and learnings that are of high value to the upcoming GEAR Center, such as which channels reduce process cycle times, deflect phone calls, reduce costs, increase citizen satisfaction, and increase job satisfaction.

Comprised of former Fortune 50 Executives, Visual Bridge has the unique past performance, industry knowledge, and technology insights that enable Government agencies to deliver faster services to citizens, increase citizen engagement and satisfaction, boost Federal worker skills, and deliver desired business outcomes.

We are delighted to share with you a high-level overview of the technology and methodology in hopes that it will be of value to the future GEAR Center.

QUESTIONS AND RESPONSES

For the purposes of this RFI, we will be answering the following question –
Informing the GEAR Center: 1. Given the mission of the GEAR Center, what should be:
Specific areas of innovation and practice to prioritize?

The answer below represents a two-pronged recommendation – the technology and our methodology. Our success in implementing this technology and our learnings from live use of the technology provide unique insight that will be invaluable to the GEAR Center.

THE PRIORITY

A main goal for the GEAR Center should be to make it as easy as possible for citizens to interact and communicate with the Government. Many Government agencies today only have traditional communication methods available, which affect agency responsiveness, citizen satisfaction, Government employee effectiveness, capacity, budgets, and job satisfaction. The GEAR Center should prioritize digital interaction and communication methods with United States citizens in order to meet expectations of the modern day and keep pace with the private sector. This will also allow the Federal Government to keep pace with current talent acquisition strategies that help attract and retain the Millennial workforce by using the latest in digital communication technology.

OUR STORY - TAXPAYER DIGITAL COMMUNICATIONS

At the Internal Revenue Service, we make it as easy as possible for taxpayers and their representatives to communicate about their tax obligations and instantly engage with the IRS. Taxpayer Digital Communications (TDC) is a program led by Visual Bridge, LLC, within the Online Services (OLS) division of IRS. Our program consists of implementing a Software-As-A-Service platform, reshaping historical analog audit processes, and conducting research pilots with the technology and process redesign that give insights into taxpayer and IRS agent behavior while simultaneously delivering desired business outcomes. The graphic below depicts the current state of IRS communications and taxpayer engagement.

Current State: Continuing to serve taxpayers through legacy channels cannot address increasing internal and external pressures.

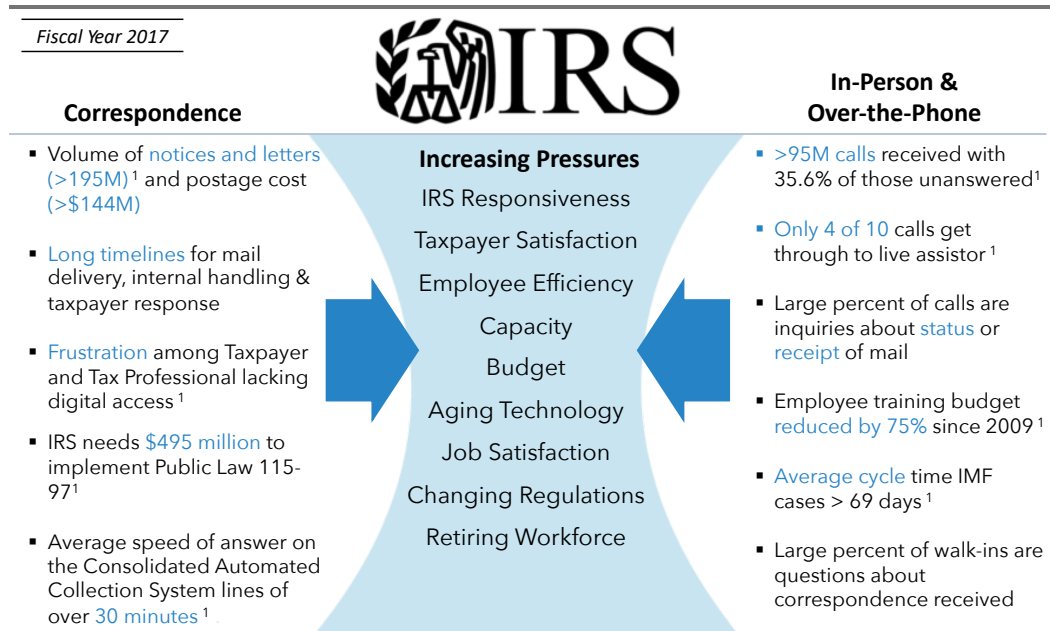


Figure 1 - The Current State of IRS Communications

Through TDC, a digital communication and engagement platform addresses the current challenges that arise from Mail, Phone, and In-Person Communications by creating digital methods that citizens are accustomed to in their interactions with private businesses. These methods are:

- Secure Messaging
- Text Chat
- Click to Call
- Video
- Co-Browsing
- Knowledge Base + Artificial Intelligence
- Virtual Assistant

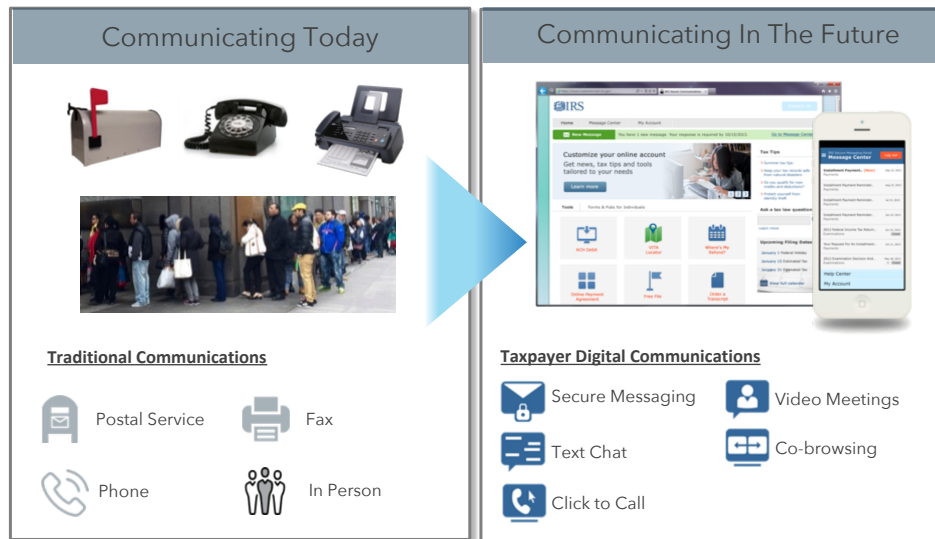


Figure 2 - Future Communication Methods at the IRS

Visual Bridge has launched six unique pilots at the IRS. All of these pilots are spun up through a customized IT process design methodology, led by our ITILv3 Experts and Lean Six Sigma Master Black Belts. The pilots are designed to acquire specific learnings around taxpayer and worker behavior as well as drive outcomes that maximize satisfaction for the taxpayer and deliver results for the business. Below are summaries of the six pilots that we have currently launched, with a results section to follow:

Correspondence Exam

Secure Messaging for correspondence examinations, with the goal of increasing taxpayer and Power of Attorney (POA) satisfaction, voluntary compliance, and reducing overall cycle time.

Automated Collection System (ACS)

Text Chat for 5972C letter and Online Payment Agreement application. The goal is to provide higher levels of service and to deflect millions of phone calls each year from the taxpayer.

Large Business & International - Affordable Care Act (ACA)

Secure Messaging to communicate to Branded Prescription Drug fee payers. TDC enhances communications between fee paying entities and the IRS and streamlines operational efficiencies for the delivery of fee letters, notices, and newsletters.

Taxpayer Advocate Service (TAS) - Levy & Earned Income Tax Credit (EITC) support

Secure Messaging to communicate to taxpayers within TAS Levy and EITC engagements. The goal of this pilot is to enhance taxpayer experiences through the use of digital communications.

Tax Exempt Government Entities – Tax Exempt Bonds

Secure Messaging to communicate to municipalities and other bond issuers during an examination. The goal is to provide streamlined communications to the IRS from the bond issuers, POAs, and conduit borrowers.

Small Business / Self Employed – Tax Compliance Officer (TCO)

Secure Messaging for Tax Compliance Officer, with the goal of allowing digital correspondence, improving taxpayer satisfaction, and reducing overall cycle time. POA support included.

Key Pilot Business Results and Learnings

- Reduced overall cycle time for Correspondence Exam audit from 200 days to 80 days
- Over 95% adoption rate on ACA use case, influencing over \$9B in annual tax revenue
- Call deflection rate of ~70% for ACS use case
- Average wait for chat is 00:29 vs. 04:00 for phone
- Average handle time for chat is 09:00 vs. 16:00 for phone
- Increase voluntary taxpayer compliance of approximately ~4%

Key Pilot Workforce Learnings

- IRS employees like interfacing with more modern communication channels
- There is a wait list to join the TDC pilots because many IRS employees volunteer to participate
- TDC agents reported a 92% employee engagement score, versus the standard 67% score reported enterprise wide by the Federal Employee Viewpoint Survey
- TDC has been said to foster a collaborative and inclusive work culture, support employee development with training opportunities and career paths, and help employees adjust to workload demand easier

Key Pilot Citizen Learnings

- Taxpayers respond faster
- Taxpayers do not call
- Taxpayers like less formal communication
- Taxpayers are more cooperative and less intimidated
- Taxpayers don't submit duplicate responses
- Taxpayers seem more "connected" and even cooperative by the ease of access

Citizen Verbatim Feedback

- "TheIRS (sic) Secure Messaging system worked really well for me. Not only did it save me money on postage, it provided me with the knowledge that the IRS received my information. Although the audit process is never something a taxpayer welcomes this system made the process a pleasant experience."
- "This is very very very good process. It is not only secure, but also fastest to resolves the audit issues. Please implement this system to all my future IRS communication. Thank you very much for letting me use this system to resolve audit issue."
- "My wife and I are extremely pleased with the efficiency of this new way to communicate with the IRS. It was fast and secure. We hope that the IRS will keep Secure Messaging moving forward and continue to improve this process. Secure Messaging helped us cut the

time between responses and both parties came to a resolution faster. Please thank the person or team that made IRS Secure Messaging possible.”

- “I really love the chat function. For us that don't know how to navigate this process but want to comply and get back on track. It's an invaluable tool. I've tried all week and failed to get the information I needed until now. I got what I needed in 10 min or less. It was great thank you.”

Results from the Foresee Customer Satisfaction Survey

A qualitative survey was sent to users with a completed audit. Survey participants were presented with questions to gauge their satisfaction and to solicit feedback regarding the Correspondence Exam pilot program. From the 216 survey respondents, Secure Messaging received an **overall customer satisfaction score of 82%**. The results from participants are outlined in *Figure 3*.

- 89% thought TDC was much better or better than mail.
- 78% were very satisfied or satisfied with how well the IRS kept them informed of the status of the case, and 73% were very satisfied or satisfied with the length of the audit process.
- Respondents' reactions to the idea that it was easy to sign up, use, and submit documentation in Secure Messaging were overwhelmingly positive as well.
- Respondents who agreed with the results of the audit or had no changes made (87% of respondents) had much higher satisfaction scores compared to those who disagreed with all of the changes or weren't sure. (Sat Score 88 v 68)
- 33% of respondents used other forms of communication - Phone (22%), Mail (12%), and/or Fax (7%).

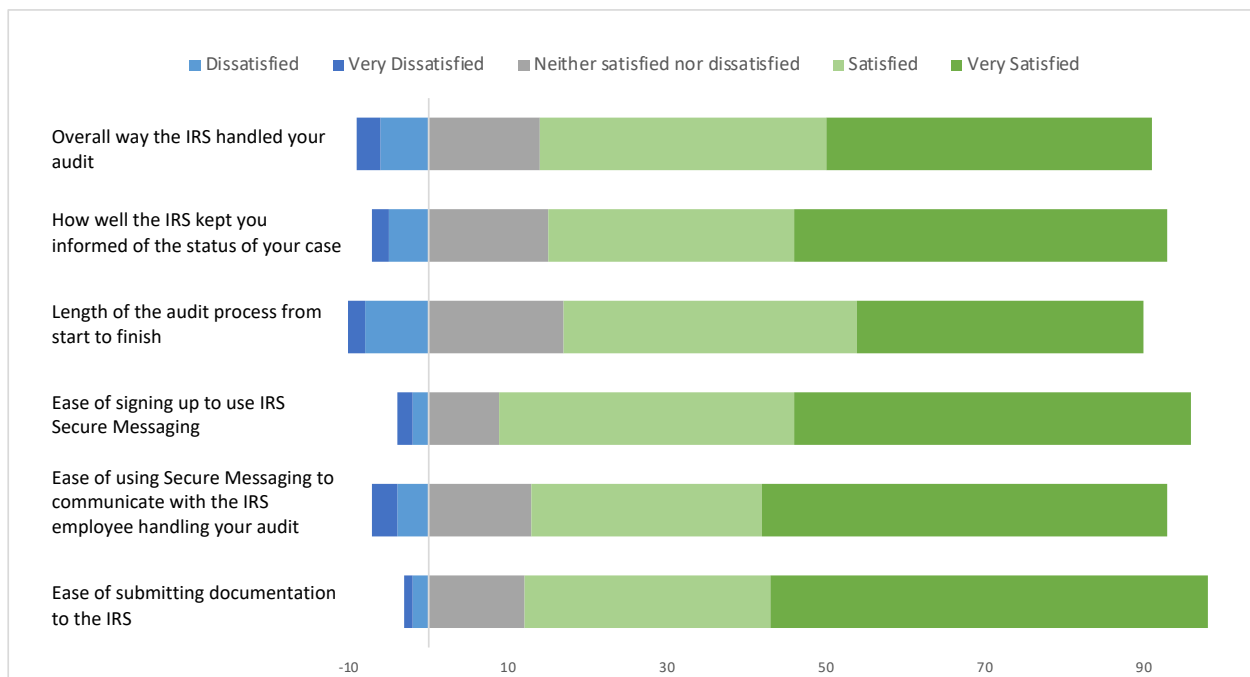


Figure 3 - Results from Foresee Survey

Factors influencing initial decision to use Secure Messaging	Respondents (%)
Ability to communicate electronically	165 (76%)
Ability to upload documents	161 (75%)
Ability to resolve the audit quickly	139 (64%)
Ability to communicate on my schedule	132 (61%)
Other	16 (7%)

TDC has been a wildly successful program that has delivered an enhanced taxpayer experience via Omni-Channel communications. The business results, pilot learnings, citizen and employee feedback, and revenue influence all point to increased Government effectiveness and provide a compelling business case to be implemented Government wide. **As of this writing, the TDC program is the highest rated citizen facing service, per taxpayer engagement survey data.**

THE INNOVATION

Omni-Channel communication platforms are cloud-based technologies that allow Government agencies to create digital communication channels that exponentially increase citizen engagement. The Omni-Channel platform we implemented at the IRS contains a bevy of engagement boosting channels, while maintaining strict security that satisfies all Government technology requirements. Here are some engagement features that will be available to the GEAR Center as ways to increase Government effectiveness and increase citizen engagement:

Secure Messaging is used to protect sensitive data when send beyond to an outside party. Secure Messaging authenticates citizens prior to allowing the viewing of confidential information and provides compliance with industry regulations such as HIPAA, GLBA and SOX. Advantages of Secure Messaging that any internet user (including mobile devices) can participate because there is no software to download.

Call Track is a dynamic case management solution that helps companies provide quick, high-quality, and cost-efficient resolution of customer issues across traditional and emerging interaction channels.

Chat enables you to offer real-time chat assistance to website visitors. Agents can exchange text messages, files, web pages, and knowledge base articles with visitors to answer their queries, proactively as well as reactively.

Virtual Assistant is a lifelike, conversational virtual agent providing a unique, interactive, and personal way for users to get answers and assistance on your website, 24 hours a day, 7 days a week. It provides the frontline support so your customer service staff can concentrate on more complex tasks.

Click to Call is a simple yet powerful solution that can be quickly implemented on web pages to offer real-time voice assistance to online visitors looking for customer service. It lets you call them over traditional voice channels like a land line or a mobile phone or, if the customer wants, you

can speak with them over the computer. The call can be set up instantly or scheduled at a later time, based on the customer's preference. And to handle the click-to-call requests, you can leverage your existing contact center agent pool.

Cobrowse enables your agents to provide high-value, live collaboration options to online customers and prospects. It gives your company the ability to deliver real-time assistance and convert website visitors into profitable, long-term customers.

Mail, the leading email management solution, helps companies manage large volumes of customer emails and webforms responsively and effectively.

Notify is a flexible, easy-to-use application for managing and delivering automatic reminders, alerts, and updates at all stages of the customer relationship cycle. It is used to provide proactive customer service by sending alerts to customers via multiple interaction channels such as email, phone, and SMS. These alerts could span various stages of a service transaction, a customer's life event, or a customer's overall life progression where a business may want to add value by providing contextual customer service.

Social is a one-of-a-kind product for social customer service, knowledge harvesting and single-sourced social publishing, and reputation management. It enables you to monitor social networks such as Facebook®, Twitter® and blogs for customer queries, analyze their content, analyze search results for sentiment, route them intelligently, and post responses privately or back to the social cloud in media-customized formats. For instance, Twitter posts use shortened URLs and conform to the 140-character limit.

Knowledge + AI guarantees high-quality customer service by infusing your customer service agents with knowledge, making them as productive and educated as your best agents. It ensures fast, consistent, and accurate answers by providing agents and other users a range of ways to get to information from the common knowledge base.

Security in the cloud is of the utmost importance. We will just review some of the highlights here that were relevant in our IRS deployment of the cloud-based technology:

- Installed on Virtual Private Cloud on Amazon Web Services (AWS) - Dedicated Host / Single Tenant
- Responsive web design works on all device types
- Received Approval to Operate after full Security Assessment and Authorization (SA&A).
- Certified by IRS Cyber to National Institute of Science and Technology (NIST) standards
- NIST Hardening based on 800-53 r4
- Federal Information Processing Standard (FIPS) Level Encryption
- Data Masking (chat) – masked data is never transmitted or saved to DBs
- Limited IT integration
- IRS Secure Access (level 3F) – first use of federated external SAML integration
- Coordinated for domain assignment, SSL certificate issuance, and web proxy configuration, respectively
- SMTP gateway and SMS gateway access

THE OPPORTUNITY FOR THE GEAR CENTER

Taken directly from the RFI, “This Center will enable live testing and piloting of new capabilities, methods and approaches and inform future direction by helping the Government anticipate and respond to changes in technology and society that have implications for Government efficiency and service to citizens. Developing this capacity supports innovation as an engine to transform the public’s experience with Government. Researchers and other GEAR Center stakeholders will validate and/or develop improved ways to effectively serve customers of Government services and rethink the experience of Government-public interactions.” Focusing on implementing Omni-Channel communications Government wide, using Visual Bridge’s methodologies and success in this space, would allow citizen-engaging agencies test new capabilities that increase Government efficiency, upskill current workers, and deliver faster services to citizens.

As an example, GEAR could recommend using Login.Gov as a starting point for a single-sign-on experience for the American citizen, permitting identity authentication that permeates Government wide, allowing citizens to communicate with various agencies about complex issues in a matter of minutes instead of months or years. The result would be a massive increase in Government efficiency and citizen satisfaction, ultimately creating a citizen experience that rivals that of the private sector. Many Government agencies, such as the Social Security Administration, Veterans Affairs, Fiscal Services, Treasury, the State Department, Health and Human Services, Department of Home Land Security, Department of Education, and many others, have millions of citizen correspondence every year. Digitizing those correspondence while creating a single user experience for citizens would have a massive positive impact on cost, time, and satisfaction.

We recommend that the GEAR Center should prioritize its future communication platform with citizens, design processes that focus on behavioral outcomes, and utilize our proven methodology to create test pilots that learn, upskill, and deliver. We would be delighted to talk with you in detail about any and all of the aspects of our project at the IRS, our thoughts on how digital communications could be implemented Government wide, or about the implications of our findings and how they would apply across agencies. We currently have a variety of business case studies already developed that will be valuable to the GEAR Center and we would love an opportunity to discuss these ideas further.