PROCEDURE

Creating ECO Leads in CRM

Business Process:	Education and Compliance Outreach
Tax Type:	All
Activity:	Creating Leads
Sub-Activity:	New Registration

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1. Scope

The procedures set forth in this section shall be used by the Education and Compliance Outreach (ECO) process. The ECO Manager will distribute business partner numbers to the Tax Specialist II's assigned to the ECO process. The Tax Specialist II's are responsible for and expected to create leads for taxpayer educational opportunities. These leads are created and managed in the Department's Integrated Compliance Management (ICM) system which is deployed in the Customer Relationship Management (CRM) module of SUNTAX.

2. Purpose

The purpose of ECO leads is to identify taxpayers who may benefit from education about the taxes administered by the Department and the responsibilities of taxpayers conducting business in Florida. These procedures outline the method to be used in creating ICM leads in CRM to ensure consistency and uniformity in the creation of such leads.

3. Procedures

The Specialist will be assigned a list of new Business Partner accounts to research for possible lead creation. Before creating a lead, the Specialist is required to review the Business Partner account information in SUNTAX (PRD) using transaction ZCIC

(Customer Interaction Center). If any of the following conditions exist on the account, the Specialist should not create a lead:

- Outstanding liabilities are present
- Active Collection activities
- Audit activities
- Voluntary Disclosure case
- START letter was previously mailed

3.1 Creating and Managing Leads

Specialists will use transaction ZICM_WORKLIST to create leads and after each successful lead is generated the following will take place:

- The New Registration letter is initiated in the Action Box and mailed
- The Specialist creates a contact log entry “START letter mailed”
- The lead is closed within the specified time-frame

3.2 Taxpayer Contact

The Specialist is required to initiate contact with the taxpayers on the list within three days after mailing the START letters. The Specialists will help taxpayers via telephone or face-to-face by offering assistance such as:

- Answering Florida tax questions
- Offering advice about completing Department tax returns or forms
- Explaining tax filing obligations
- Finding educational resources and information on the Department’s website
- Providing information about our partnership with SCORE, a non-profit association.

3.3 Lead Referral Visibility GTA Wide

When the ECO lead is created, it will immediately display in the Cases/Activities area of the Customer Interaction Center (ZCIC), Create Service Notification (IW54), and Customer Overview (ZCVIEW) screens. All SUNTAX users can view the ECO lead as well as all other leads and activities on the account. The Cases/Activities information provides greater awareness of all Department interactions with the taxpayer and the activities taken on the account.

Date Signed and Revision History

Effective Date	Explanation
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07/2018	New Procedure
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