

Modernization Fun – Improving People, Processes, and Technology



Indiana Department of Revenue



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The Great State of Indiana

- 6.7 million Hoosiers
- 4.3 million individual taxpayers
- 3.4 million returns (88% electronic)
- 2.2 million individual refunds
- 340k business taxpayers
- 685 DOR team members in 13 locations
- 65 tax types – \$21 billion per year in tax revenue

Our Business and Systems Modernization Journey

- Project research, justification, and funding 2015 - 2016
- Project development, RFI/RFP, vendor selection 2017 - 2018
- Organizational modernization and preparation 2017 - 2019
- Rollout 1 (corporate taxes) 2018 - Labor Day 2019
- Rollout 2 (trust taxes) 2019 - Labor Day 2020
- Rollout 3 (individual taxes) 2020 - Labor Day 2021
- Rollout 4 (special taxes) 2021 - Labor Day 2022

Establish Project Goals and Deliverables

- Improved Customer Service and Service Offerings
- Improved Internal Processing Improvements and Efficiencies
- Improved Financial Management and Internal Controls
- Improved Data Accuracy and Usage (Reporting, Analytics, Decision Support)
- Improved Technology Infrastructure – Integrated, Configurable, Maintainable

10 Steps to Modernization Success

<i>“System” Modernization</i>	<i>“Business” Modernization</i>
Build the project	Prepare the organization for change
Build the project team	Improve your service delivery operations
RFI/RFP, Partner Selection	Build the village
Launch the journey	Build a learning organization
Do the difficult, exciting, & exhausting work	Light and fuel the energy

