Modernization Fun – Improving People, Processes, and Technology

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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

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