

Item Title: Taxpayer Communication and CRM Support Tool

Specific Action Requested:

That the Board of Commissioners authorizes the County Manager to enter into a multi-year contract with SATRDE/Zendesk to implement the Zendesk Support Suite Enterprise Customer Relationship Management platform for Wake County Tax Administration subject to terms and conditions acceptable to the County Attorney.

Item Summary:

Purpose: Multi-year service agreements require the Board of Commissioners' approval.

Background: Wake County Tax Administration receives over 75,000 phone calls and more than 30,000 emails annually in support of taxpayer inquiries across a wide range of services, including real estate, collections, gross receipts, tax relief, vehicles, individual and business personal property, and multilingual assistance. Approximately 1/3 of calls and emails are about registered motor vehicles, and another 1/3 are about property tax collection.

Zendesk Support will enable Tax Administration to provide enhanced customer service by consolidating multiple channels of communication and information delivery with a single support interface. In addition to existing phone and email support, the customer relationship management software will introduce AI and web forms with Wake County Tax Administration knowledge base to provide answers and responses outside of routine business hours, providing enhanced customer service to taxpayers.

Strategic Plan: This action supports routine County operations.

Fiscal Impact: The current year's cost is \$74,340 and is included in the FY 2026 budget. Future costs are \$243,360 for FY 2027 and FY 2028 (\$121,680 recurring).

Additional Information:

Tax Administration is responsible for appraising, assessing, and listing all real estate and personal property within Wake County, its 15 municipalities and related service districts. The Department also collects all current and delinquent taxes on such property excluding registered motor vehicles. In addition, the Department oversees the billing and collection of the Prepared Food & Beverage Tax, Hotel/Motel Room Occupancy Tax, Rental Vehicle Tax, Special Assessments, and various licensing and permits. Wake County Tax Administration continues to experience significant growth. The County currently has approximately 440,000 parcels; since 2020, over 45,000 new parcels have been added. The County is now approaching one million registered motor vehicles. While registered

motor vehicle values are initially established by the Department of Revenue through North Carolina's Tag and Tax Together program, which combines the billing of annual vehicle registration fees and vehicle property taxes so they can be paid together, Wake County Tax Administration handles all appeals of vehicle valuation. The Department also has seen growth in customer transactions - since 2020 Wake County Tax Administration has processed an additional 58,000 payments.

Current systems are disparate and do not allow for coordination, tracking, and history of customer engagement. In addition, there is an increasing demand for customer service outside of the Department's regular business hours of 8:30 AM – 5:00 PM, excluding County holidays. One-third of email inquiries are received after regular business hours, causing delayed customer responses. Modern web forms and AI can address some of these customer service inquiries, providing prompt response to taxpayers.

A Customer Relationship Management system offered by Zendesk will enhance the Department's ability to provide efficient, transparent, and customer-focused service to Wake County taxpayers. Zendesk meets all technical requirements, offers strong functionality, competitive pricing, and provides strong integration with Tax Administration's call center platform. The centralized CRM functionality provides workflows, automated responses, queues, and routing. It will allow the Department to scale its current customer service tools to meet technological demands that come with the volume of taxpayer inquiries experienced by the Department. Zendesk is also used by Wake County Human Resources for its call center for County employees.

Attachments:

None.