2023 Operations Timeline

Feb 28 Moved from Outsourced Cisco Phone System to Insourced **AWS** Connect

Feb 28 **Transition** ed away from third party staff

June 1 Moved from Oracle CRM to Microsoft **Dynamics** 365

July CRM Dashboard Created (knowing our work)

August First Phone **Training** Class for OE

Hired additional MA Site Staff for Phones

August September First application training class for OE September Phone **Training** Classes

October Phone and **Application** Training Classes

November Tier II Training Class

November Hired Knowledge Base and CRM Specialist

December **Implemented** Service Agent Chat





2024 Initiatives

- Create Knowledge Base Content
 - Articles to help with policies, procedures, and Q&A
- Chat Phase 2
 - Implement real time reporting
- Potential Texting Capabilities
 - Ability to communicate with customers via text
- Enhance Reporting
 - Further enhance dashboard reporting for more visibility
- Document Verifications
 - Verification of documents to determine APTC eligibility
- OE Preparation
 - Staffing, Phone and Application Training, Class Timing

