IRS Enterprise Concept of Operations (CONOPS)

Overview of SB/SE and W&I, LB&I, and TE/GE CONOPS

January 15, 2015
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I

Introduction to BOD CONOPS Efforts
The IRS is transforming compliance and services to respond to external and internal factors that are necessitating changes to the traditional way of doing business.

**Evolving Taxpayer Expectations**

Taxpayer expectations for service, greater public scrutiny, and new Initiatives have energized leadership to accelerate changes at the IRS.

**Increasing Complexity**

Legislative changes and the proliferation of data has created greater complexity of tax administration.

**Declining Budget**

Reductions in funding, an increasing demand for demonstration of ROI and a stagnant tax gap is putting pressure on the IRS to increase revenues and lower costs.

**Increasing Occurrence of Refund Fraud & Identity Theft**

Significant increase to both refund fraud schemes and identify theft in the past three years.
To begin addressing these internal and external challenges, a CONOPS was created for each of the IRS’s Business Operating Divisions (BODs).

**CONOPS:** Defines a future state vision for an organization and identifies the work necessary to implement the vision

**BOD CONOPS Development**

Over the past six months, each BOD developed a CONOPS to articulate their respective vision and a strategic approach to accomplish BOD priorities over the next five years. Each BOD CONOPS was informed by:

- Reviewing ongoing initiatives, stakeholder interviews, and additional materials
- Applying BOD perspective and priorities
- Incorporating leading practices from government and industry

**BOD CONOPS Components**

Three CONOPS for SB/SE and W&I, TE/GE, and LB&I solidify and operationalize the vision for each BOD by establishing division-specific guiding principles, capabilities, and initiatives.

- **Guiding Principles:** Identifies “WHERE” the division wants to be in the next five years
- **Capabilities:** Highlights “WHAT” organizational competencies are needed to realize the future vision
- **Initiatives:** Defines “HOW” to drive forward momentum for a comprehensive set of necessary change efforts
Several prominent themes emerged from across the three CONOPS, and begin to establish a foundation for what the IRS will look like in the future.

<table>
<thead>
<tr>
<th>THEMES</th>
<th>DESCRIPTION</th>
<th>FUTURE DIRECTION</th>
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<tbody>
<tr>
<td>Data-Centric Operations</td>
<td>Continuously improve operations and decision-making with universal access to data (both internal and external sourced) and incorporation of robust data analytics</td>
<td>In the future, the BODs are focused on being:</td>
</tr>
<tr>
<td>Simplified Taxpayer Experience</td>
<td>Empower taxpayers, improve customer experience, and increase taxpayer satisfaction by providing convenient and accessible compliance knowledge and tools.</td>
<td>✓ More digital</td>
</tr>
<tr>
<td>Expanded Partnerships with Tax Community</td>
<td>Leverage relationships with key groups within the tax community to better facilitate information exchange, create dialogue, and broaden taxpayer support network.</td>
<td>✓ More virtual</td>
</tr>
<tr>
<td>Compliance Risk-Focused Operations</td>
<td>Focus its operations on emerging and impactful compliance risks, preventing future non-compliance and maintaining flexible business operations.</td>
<td>✓ More customer-focused</td>
</tr>
<tr>
<td>Flexible and Well-Supported Workforce</td>
<td>Promote flexibility and competency within the workforce through a focus on virtual capabilities and enhanced employee development opportunities and tools.</td>
<td>✓ More operationally efficient</td>
</tr>
<tr>
<td>Strategic Workload Allocation</td>
<td>Efficiently match work to appropriate resources through automated systems and filters, incorporating an understanding of workforce capabilities and capacities.</td>
<td>✓ More engaged with partners</td>
</tr>
<tr>
<td></td>
<td></td>
<td>✓ More voluntarily compliant</td>
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</table>
While many points of commonality exist across the BODs, challenges and priorities unique to each BOD and their respective taxpayers also surfaced.

<table>
<thead>
<tr>
<th>TAXPAYERS</th>
<th>Small Business / Self-Employed and Wage &amp; Investment</th>
<th>Large Business and International</th>
<th>Tax Exempt / Government Entities</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Individuals responsible for filing tax returns</td>
<td>• Corporations and partnerships with assets greater than $10M</td>
<td>• Exempt Organizations</td>
<td></td>
</tr>
<tr>
<td>• Self-employed individuals</td>
<td>• International entities and individuals</td>
<td>• Tax Exempt Bond issuers</td>
<td></td>
</tr>
<tr>
<td>• Employment, excise, estate, gift returns</td>
<td></td>
<td>• Employee Plans</td>
<td></td>
</tr>
<tr>
<td>• Corporations with assets less than $10M</td>
<td></td>
<td>• Federal, State, and Local Governments</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>CHALLENGES</th>
<th>Small Business / Self-Employed and Wage &amp; Investment</th>
<th>Large Business and International</th>
<th>Tax Exempt / Government Entities</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Increasing occurrence of refund fraud and identity theft</td>
<td>• Global, legislative and policy changes, proliferation of data types and sources</td>
<td>• Parallel operations across diverse programs with varied taxpayer groups</td>
<td></td>
</tr>
<tr>
<td>• Workload constraints allocation given geographic dispersion of the workforce</td>
<td>• Entities and individuals rapidly adapting to creatively minimizing tax liability</td>
<td>• Significant external stakeholder involvement and public scrutiny</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>PRIORITIES</th>
<th>Small Business / Self-Employed and Wage &amp; Investment</th>
<th>Large Business and International</th>
<th>Tax Exempt / Government Entities</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Online accounts that enable secure taxpayer communication and transactions</td>
<td>• Fuller use of internal and external data and predictive analytics</td>
<td>• Portfolio of tools, education, and partnership opportunities to increase taxpayer compliance</td>
<td></td>
</tr>
<tr>
<td>• Anomaly detection and digital self-correction capabilities</td>
<td>• Focused campaigns to drive work selection</td>
<td>• Sharper focus on significant misconduct and other aggressive behavior</td>
<td></td>
</tr>
<tr>
<td>• Virtualizing enforcement activities such as Exam and Collection</td>
<td>• Integration of different treatments to achieve multiplier effects</td>
<td>• Data analytics capabilities to support optimal resource allocation</td>
<td></td>
</tr>
<tr>
<td>• Transition from multi-year to closing ~90% of cases within a year of filing.</td>
<td>• Expanded support infrastructure and deliberate incorporation of feedback</td>
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</table>
The SB/SE and W&I CONOPS integrates ongoing efforts with the needs of the business to coalesce on a strategic vision for compliance and service.

The SB/SE and W&I CONOPS was developed by:

- Reviewing ongoing Initiatives, stakeholder interviews and additional materials produced to date by the working teams
- Applying the BOD perspective and priorities
- Incorporating Leading Practices

These inputs served to form a vision and approach that is:
- Strategic
- Prioritized
- Comprehensive
- Integrative
- Focused on BOD priorities
The Concept Diagram helps to operationalize the compliance and services vision and positions a bold target of achieving ~90% compliance closure within a filing year.

**Preemption**: Leverage tools, education, preparers and partnerships to reduce errors and non-compliance.

- Enhance preparer/employer programs and proactive taxpayer engagement.
- Create new channels and maximize self-service.

**Issue Identification, Filing Resolution**: Maximize pre-refund automatic issue identification and self-correction.

- Taxpayer Account externally visible
- ~80% near simultaneous matching, determinations
- Maximize self-correction

**Early taxpayer engagement by IRS Personnel**

- Tax Preparers 1: Many
- Employers 1: Many
- Software Preparers 1: Many
- Payroll Providers 1: Many

**Communication Channels & Capabilities**

- E-File ~88%
- Paper ~12%
- ~80% Auto-Check

**Consolidation**

- Occurs within ~3-5 days
- Strengthen Fraud/ID Theft

**Data-Centric Operation**

- 3rd Party Data
- Case MetaData
- Dynamic Rules & Models

**Collections**

- Exam
- Early Notification
- Balance Due
- Refunds ~85%+

**Innovative on-line payment**

**Maximum Enforcement Results**: Generate maximum collection/exam results by leveraging case selection, early engagement, virtualized work, reengineered processes

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**Insight**: Perform year-round analysis of groups and individual returns to enhance rules, drive campaigns, and improve work selection.
Initiatives and Work Areas were defined in order to help operationalize a plan for SB/SE and W&I to effectively achieve the compliance and services vision.

With a clear vision that emerged from BOD sessions as well as CCV and SOD efforts coupled with a read on needed Capabilities, Initiatives and Work Areas begin to define actionable plans.

### I. Vision and Focus Areas: Scopes goals and sharpens focus
Articulates a future state for compliance and services

### II. Capabilities: Shapes Initiative and Work Areas
Identifies key organizational competencies needed

### III. Initiatives: Bundles sets of complimentary Work Areas
Defines comprehensive set of change efforts needed

<table>
<thead>
<tr>
<th></th>
<th>Initiatives</th>
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<tbody>
<tr>
<td>1</td>
<td>Preventative Outreach</td>
</tr>
<tr>
<td>2</td>
<td>Pre-File Error Resolution</td>
</tr>
<tr>
<td>3</td>
<td>Account Access</td>
</tr>
<tr>
<td>4</td>
<td>Digital Self-Correction</td>
</tr>
<tr>
<td>5</td>
<td>Enhanced Issue Identification &amp; Triage</td>
</tr>
<tr>
<td>6</td>
<td>Optimized Phone Channel</td>
</tr>
<tr>
<td>7</td>
<td>Restructured Compliance Activities</td>
</tr>
<tr>
<td>8</td>
<td>Improved Case Work Environment</td>
</tr>
<tr>
<td>9</td>
<td>Analytics Strategy &amp; Infrastructure</td>
</tr>
<tr>
<td>10</td>
<td>Analytics Products &amp; Services</td>
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</table>
IRS LB&I CONOPS: Executive Summary
Building upon ongoing division efforts, the LB&I CONOPS helps to develop a clear picture of where the division is going.

**LB&I CONOPS Development Process**

Conducted leadership interviews, reviewed materials outlining LB&I processes, and integrated the division-wide change efforts, including the LB&I Sub-Teams:

- Training and Competency
- Foundations
- Centralized Classification
- Roles and Responsibilities for Practice Areas
- Position Descriptions
- Technology
- NTEU / Negotiations
- Remote Work
- Communications
- GS-14 Temp and Perm – Position Description
- Roles and Responsibilities for Future State
- Metrics

Applied internal best practices and other ongoing change efforts

Incorporated industry and government leading practices
This picture of where LB&I wants to be in the future is framed around a core set of guiding principles.

**Flexible, Well-Trained Workforce**

Cultivate an environment of continuous learning to support a flexible workforce with robust training, foundational skillsets, specialized knowledge, and dynamic tools.

**Selection of Better Work**

Utilize data analytics and examiner feedback to select better work with intended compliance outcomes.

**Tailored Treatments**

Employ an integrated set of tailored treatment streams to improve flexibility to address current and emerging issues and achieve compliance outcomes.

**Integrated Feedback Loop**

Drive continual collection and analysis of data and feedback to enhance ability to focus, plan, and execute work, and promote innovation and feedback-based improvement.
These guiding principles shape the future direction of LB&I work and how it will be performed differently.

In order for LB&I work to matter more than it does today, the division will...

1. **FOCUS**
   - Scan Universe of External and Internal Inputs
   - Analyze Risk
   - Build Campaigns
   - Develop Issues

2. **PLAN**
   - Execute Work
   - Select Work
   - Adapt

3. **EXECUTE**
   - Support work execution with dynamic tools, robust support infrastructure, and timely feedback mechanisms.

4. **ADAPT**
   - Continually gather, assess, and incorporate feedback to enhance operations and improve taxpayer compliance.

- Better identify and prioritize areas of compliance risk to more effectively address taxpayer compliance.

- Decide what work is performed, who performs it, and what support is needed, based on areas of compliance risk.

- Flexible, Well-Trained Workforce
- Selection of Better Work
- Tailored Treatments
- Integrated Feedback Loop
Strengthening strategic organizational capabilities through a set of initiatives will help LB&I to get to where it wants to be in the future.

Capabilities define “WHAT” LB&I needs to do well

<table>
<thead>
<tr>
<th>Capabilities</th>
<th>Initiatives</th>
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<tr>
<td>Campaign Design</td>
<td>Initiatives guide LB&amp;I on “HOW” to realize its future direction</td>
</tr>
<tr>
<td>Data Analytics</td>
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</tr>
<tr>
<td>Work Selection</td>
<td>1. <strong>Risk Identification:</strong> Identify and assess compliance risk using internal and external data sources</td>
</tr>
<tr>
<td>Knowledge Management</td>
<td>2. <strong>Issue Triage and Outcome Identification:</strong> Move towards an outcome-driven approach that prioritizes risk areas and associated issues</td>
</tr>
<tr>
<td>Integrated Performance Management</td>
<td>3. <strong>Campaign Design and Planning:</strong> Design focused and integrated campaigns to achieve intended compliance outcomes</td>
</tr>
<tr>
<td>Workforce Management</td>
<td>4. <strong>Resource Allocation:</strong> Select the best-suited resources and provide the right support necessary to execute work</td>
</tr>
<tr>
<td>Strategic Capabilities</td>
<td>5. <strong>Optimized Compliance Operations:</strong> Execute campaigns using integrated treatments</td>
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<td></td>
<td>6. <strong>Dynamic Tools and Support:</strong> Support workforce with knowledge and resources needed to execute work</td>
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<td></td>
<td>7. <strong>Continuous Feedback and Feedback-Based Improvement:</strong> Maintain a continuous feedback loop that identifies operational improvements</td>
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Capabilities define “WHAT” LB&I needs to do well, while Initiatives guide LB&I on “HOW” to realize its future direction.
IV

IRS TE/GE CONOPS: Executive Summary
The TE/GE CONOPS vision is framed around a set of five guiding principles that will be used to guide organizational decisions.

**Self-Sufficient and Compliant Taxpayers**
Interactive tools, education, information, and stakeholder engagement are used to increase voluntary compliance.

**Significant Non-Compliance and Aggressive Taxpayer Behavior Focus**
Enforcement activities across TE/GE are focused on significant misconduct and other aggressive behavior that push the boundaries of tax law.

**Resource Allocation Optimization**
Resources are allocated across TE/GE functions and programs to focus workload on compliance strategies and taxpayer self-sufficiency.

**Well-Trained, Flexible, and Collaborative Workforce**
A culture of information-sharing and collaboration are developed through a well-trained, flexible, and empowered workforce.

**Continuous Improvement Feedback Loop**
Consistent collection and analysis of data is used to proactively understand taxpayer behavior, identify risks, and focus workload distribution.
The vision shifts TE/GE from a focus on exams and determinations to enabling voluntary compliance through self-service and focused enforcement.

### Current State

- **Examination**
  - Exams, Compliance Checks, Classification, Office/Correspondence Examination Program, ROO Surveys, Referrals
- **Customer Education and Outreach**
  - 1:1 Taxpayer Interactions, Online Resources, Taxpayer Toolkits, Phone Forums, Newsletters, Seminars, Webinars
- **Rulings and Agreements**
  - Determinations, Rulings, Guidance, Technical, Information Letters, Correspondence and Notifications
- **Headquarters**
  - Communications, Finance, HR, EDI, Research, Congressionals, Work Planning, TAS Coordination

### Future Vision

- **Data Analytics**
  - Sensing and Trend Analysis, Anomaly Detection on Returns Filed, Performance Measurement, Research, Work Planning, Classification, Referrals
- **Focused Enforcement**
  - Exams, Compliance Checks, Office/Correspondence audits
- **Taxpayer Self-Service**
- **Streamlined Determinations & Qualifications**
  - Streamlined Determinations, Rulings, Tailored Guidance, Technical, Information Letters, Tailored Correspondence and Notifications, Model Language
- **Internal Support**
  - Knowledge Repositories, Internal IT Tools, Training Development, Communications, Finance, HR, EDI, Congressionals, TAS Coordination
TE/GE taxpayers will experience more accessible, tailored, focused, and efficient interactions with TE/GE as a result of the shift.

**Future Vision**

**More accessible**
- E-filing facilitates taxpayer submission of forms online
- **External stakeholder collaboration** provides taxpayers with additional support from external subject matter experts
- **Digital and mobile platforms** make it easy to find and navigate information on the go

**More tailored**
- **Tailored digital information** answers specific inquiries quickly
- **Taxpayer accounts** give taxpayers access to their past and present taxpayer documents and allow them to quickly fill out new documents when necessary

**More focused**
- **Error reduction tools** help taxpayers reduce the likelihood of an examination by simplifying the filing process and allowing correction of errors on already-filed documents
- **Data analytics** enable TE/GE to more precisely identify non-compliance, limiting the likelihood of examinations for the average compliant taxpayer

**More efficient**
- Reduction in average taxpayer time spent responding to TE/GE requests, improving the taxpayer experience
Strengthening core organizational capabilities through a set of key initiatives will enable TE/GE to realize the established vision.

Core Capabilities

Capabilities define “WHAT” TE/GE needs to do well

Key Initiatives

Initiatives will guide TE/GE on “HOW” to realize the future vision

1. Data Informed Decision-Making
2. Taxpayer Error Reduction
3. Digital Platforms
4. External Stakeholder Engagement
5. Workforce Development
6. Workload Management
Enterprise CONOPS Objectives
The Enterprise CONOPS will identify shared objectives across the organization and prioritize key concepts to transform the way the IRS does business.

The Enterprise CONOPS will utilize the DCOS Vision and CONOPS created for SB/SE and W&I, TE/GE and LB&I that provide each BOD with transformative visions.

**The Enterprise CONOPS will...**

- Support a **Service-wide vision for the future** that uses BOD priorities to inform Service-wide priorities and enables stronger connections between strategy and budget to inform strategic choices around resourcing, technology, investments and footprint.
- Identify the services, taxpayer segments, geographies, and operating models that will receive enterprise-wide priority as the Service moves toward the future vision.
- Present the Service-wide vision from the perspective of the “**taxpayer of the future,**” “**employee of the future,**” and the “**taxpayer submission of the future**” to inform business operations, improve customer focus, and build the foundation for a digital, data-driven culture.
- Highlight **key enterprise capabilities across BODs and services across DCOS** that are critical to achievement of the Service-wide vision.
- Present a framework and roadmap for moving forward with transformation efforts.
VI

Appendix
SB/SE and W&I CONOPS: Guiding Principles and Initiatives

Guiding Principles identify “WHERE” SB/SE and W&I wants to be in the next five years

- **Preemption**: Leverage tools, education, preparers and partnerships through issue-driven campaigns to reduce errors and non-compliance

- **Issue Identification, Filing Resolution**: Maximize pre-fund automatic issue identification to drive self-correction at filing

- **Maximum Enforcement Results**: Generate maximum collection/exam results by leveraging case selection, early engagement, virtualized work, reengineered processes

- **Insight**: Utilize analytics and innovative research to maximize proactive and preemptive outreach, facilitate issue identification and enhance service and enforcement outcomes

Initiatives guide SB/SE and W&I on “HOW” to realize its future direction

| **1** | **Preventative Outreach**: Pre-filing outreach activities designed to positively influence taxpayer, preparer, and employer behavior |
| **2** | **Pre-File Error Resolution**: Technology and process redesigns to resolve errors before filing or to engage taxpayers, employers or others earlier |
| **3** | **Account Access**: Provide online account access that enables taxpayers to securely interact with the IRS |
| **4** | **Digital Self-Correction**: Digital self-correction enables taxpayers to securely verify return changes made by the IRS, update/ amend returns, and provide additional documents |
| **5** | **Enhanced Issue Identification and Triage**: Rule-based return flagging and triaging to support appropriate treatment stream alignment |
| **6** | **Optimized Phone Channel**: Deliver improved performance and capabilities across the phone enterprise |
| **7** | **Restructured Compliance Activities**: Implement structural change in compliance activities to drive operational efficiencies and innovation |
| **8** | **Improved Case Work Environment**: Improve the methods through which a case is conducted and closed via the use of digitized tools and streamlined processes |
| **9** | **Analytics Strategy and Infrastructure**: Create of an environment that drives the most effective and efficient analysis programs |
| **10** | **Analytics Products and Activities**: Expand and enhance analysis products and activities |
## LB&I CONOPS: Guiding Principles and Initiatives

**Guiding Principles identify “WHERE” TE/GE wants to be in the next five years**

<table>
<thead>
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<th>Flexible, Well-Trained Workforce</th>
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<td>Selection of Better Work</td>
<td>Utilize data analytics and examiner feedback to select better work with intended compliance outcomes</td>
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<tr>
<td>Tailored Treatments</td>
<td>Employ an integrated set of tailored treatment streams to improve flexibility to address current and emerging issues and achieve compliance outcomes</td>
</tr>
<tr>
<td>Integrated Feedback Loop</td>
<td>Drive continual collection and analysis of data and feedback to enhance ability to focus, plan, and execute work, and promote innovation and feedback-based improvement</td>
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</tbody>
</table>

**Initiatives guide TE/GE on “HOW” to realize its future direction**

1. **Risk Identification**: Identify and assess compliance risk using internal and external data sources
2. **Issue Triage and Outcome Identification**: Move towards an outcome-driven approach that prioritizes risk areas and associated issues
3. **Campaign Design & Planning**: Design focused and integrated campaigns to achieve intended compliance outcomes
4. **Resource Allocation**: Select the best-suited resources and provide the right support necessary to execute work
5. **Optimized Compliance Operations**: Execute campaigns using integrated treatments
6. **Dynamic Tools, Training, & Support**: Support workforce with knowledge and resources needed to execute work
7. **Continuous Feedback and Feedback-Based Improvement**: Maintain a continuous feedback loop that identifies operational improvements
TE/GE CONOPS: Guiding Principles and Initiatives

**Guiding Principles identify “WHERE” LB&I wants to be in the next five years**

<table>
<thead>
<tr>
<th>Guiding Principle</th>
<th>Description</th>
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<td>Self-Sufficient and Compliant Taxpayers</td>
<td>Interactive tools, education, information, and stakeholder engagement are used to increase voluntary compliance</td>
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<td>Well-Trained, Flexible, and Collaborative Workforce</td>
<td>A culture of information-sharing and collaboration are developed through a well-trained, flexible, collaborative, and empowered workforce</td>
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<td>Continuous Improvement Feedback Loop</td>
<td>Consistent collection and analysis of data is used to proactively understand taxpayer behavior, identify risks, and focus workload distribution</td>
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**Initiatives guide LB&I on “HOW” to realize its future direction**

1. **Data Informed Decision Making**: Establish management processes for the continuous collection, transfer, and application of data
2. **Taxpayer Error Reduction**: Provide taxpayers with user-friendly tools, resources, and education
3. **Digital Platforms**: Provide taxpayers and third parties with secure online accounts, digital tools, and online information
4. **External Stakeholder Engagement**: Increase stakeholder education and involvement
5. **Workforce Development**: Expand workforce capabilities and improve employee satisfaction
6. **Workload Management**: Increase the efficiency of TE/GE operations and workflows