



Services provided for citizens: a user-centric model

Cinzia Castelli - Fiscal Services Directorate - Taxpayer Assistance Office

IOTA September 24, 2025

Transforming the Taxpayer Experience

The Italian Revenue Agency has undertaken a comprehensive digital transformation and organizational program to modernize taxpayer services, streamline administrative procedures, review of assistance activities,

encouraging citizens to embrace digital-first solutions whilst maintaining accessibility for all users.

continuous enhancement of online services for taxpayers and intermediaries through improved usability design and the introduction of innovative support mechanisms.

developing new user relationship model - from traditional counter-based assistance to an innovative multichannel system powered by advanced technology and citizen-centered design



Digital Services Driving Efficiency

15.8M

Active Users

Citizens accessed online services throughout 2024



Pre-filled Tax Returns

Over 1 billion pieces of pre-populated information, enabling 4.95 million direct submissions and approximately 19.8 million through intermediaries



VAT Processing

Successfully processed returns for 2.48 million VAT-registered businesses, streamlining compliance and reducing administrative burden

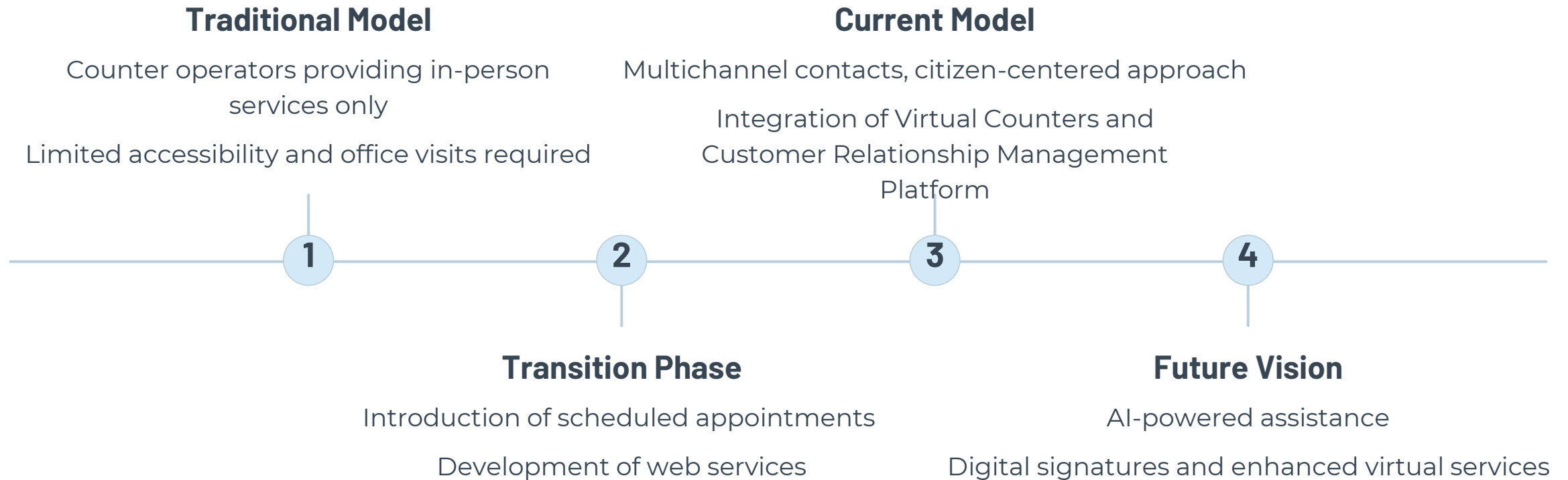


Electronic Services

Comprehensive digital offerings including invoicing, payments, inheritance declarations, and document delivery systems

The transformation's success is exemplified by rental contract registrations, where electronic submissions reached 93% of all registrations in 2023. Over 1.75 million contracts were registered online compared to just 125,000 in-person registrations. Electronically registered contracts represented over 74% of the total number of rent agreements registered, while preliminary contracts registered electronically amounted to over 83% of all contracts registered. As of 31 December 2024, 93% of inheritance declarations are submitted electronically.

From counter service to multichannel experience



Our organizational reform is based on criteria of maximum operational efficiency, with taxpayers as our priority focus. The emphasis has shifted to service quality, transparency, accessibility, and proactive assistance.

From Physical Counters to Digital Engagement



Ufficio

TJT XXXYYY

[Localizza sulla mappa](#)

Prenota prima data disponibile

In presenza: [03/10/2025](#)

In assistenza telefonica: [09/09/2025](#)

In videochiamata: [09/09/2025](#)

A Fundamental Shift in Approach

The traditional model required citizens to:

- Visit offices in person, often facing long wait times
- Navigate complex bureaucratic processes
- Interact through limited communication channels

Our new service model enables:

- Multichannel engagement (web, phone, video, in-person)
- Scheduled appointments via website, app, or toll-free number
- Remote service delivery with enhanced support tools

Customer Relationship Management CRM: the new Relationship Model



Single View of Citizens

A single view of users' interactions across all agency contact points



Knowledge Management

Tools enabling efficient knowledge sharing among operators for consistent service delivery



Integrated Systems

Databases and key support applications consolidated into a single platform

The Customer Relationship Management platform has been extended to nearly all local and provincial offices, putting citizens at the heart of service provision and enabling a concrete approach to citizen-centered assistance.

i The CRM system serves as the main platform for managing assistance requests from citizens, tax professionals, Multichannel Assistance Service consultants, and local office operators.

Advantages of the CRM Platform

Advanced Analytics

Sophisticated tools for analyzing and measuring data and results achieved

Process Integration

Streamlined work processes and procedures through automated repetitive tasks

Operator Focus

Enables staff to concentrate on higher-value activities and complex assistance

Cultural Transformation

Shifts organizational mindset toward citizen-centered service design



The CRM provides a unified view of all citizen interactions and enables data-driven service improvements

Citizen Participation: The Co-Design phase

User Research

Gathering insights through surveys, interviews, and analysis of citizen feedback

Co-Design Workshops

Involving citizens in the design process to identify pain points and opportunities

Prototype & Test

Creating service prototypes and testing with real users before full implementation

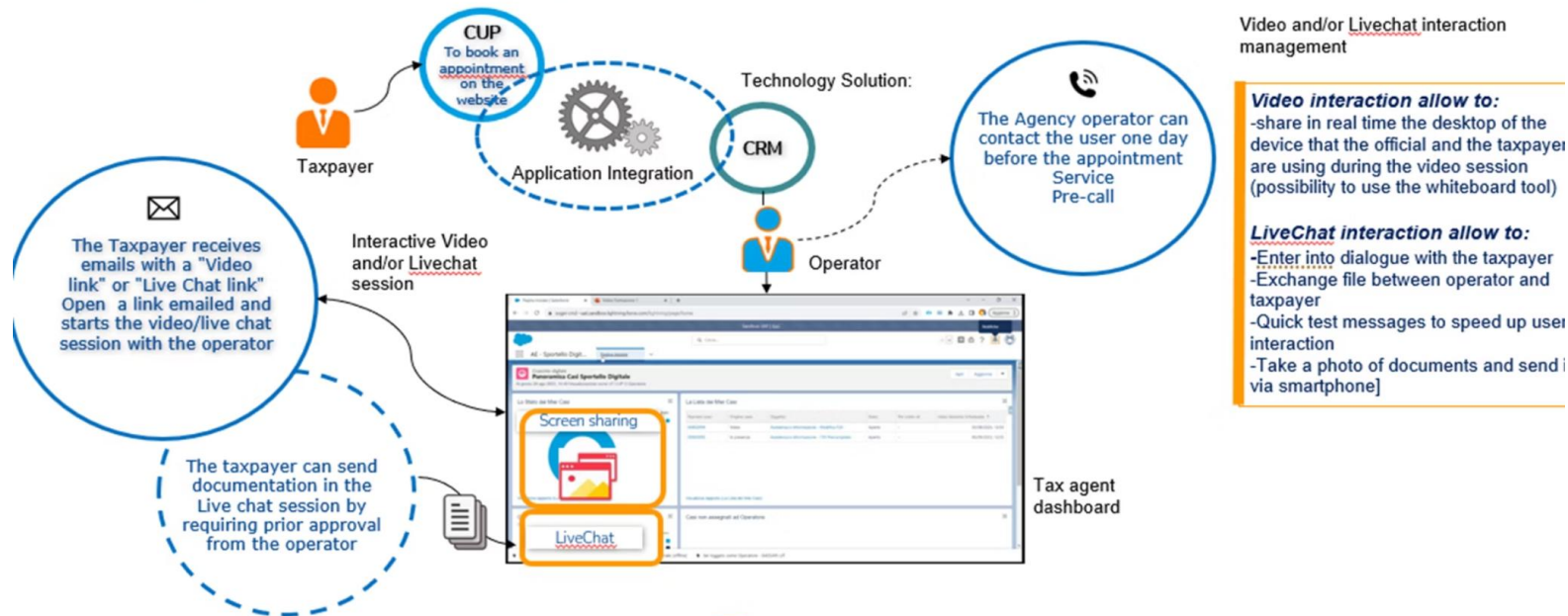
Continuous Improvement

Ongoing analysis of customer satisfaction and refinement of services



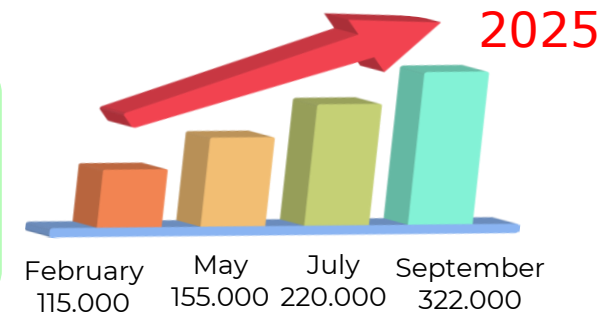
The Virtual Counter- Rethinking the physical counter

Agenzia delle Entrate: The «virtual counter» an-all round solution to provide assistance

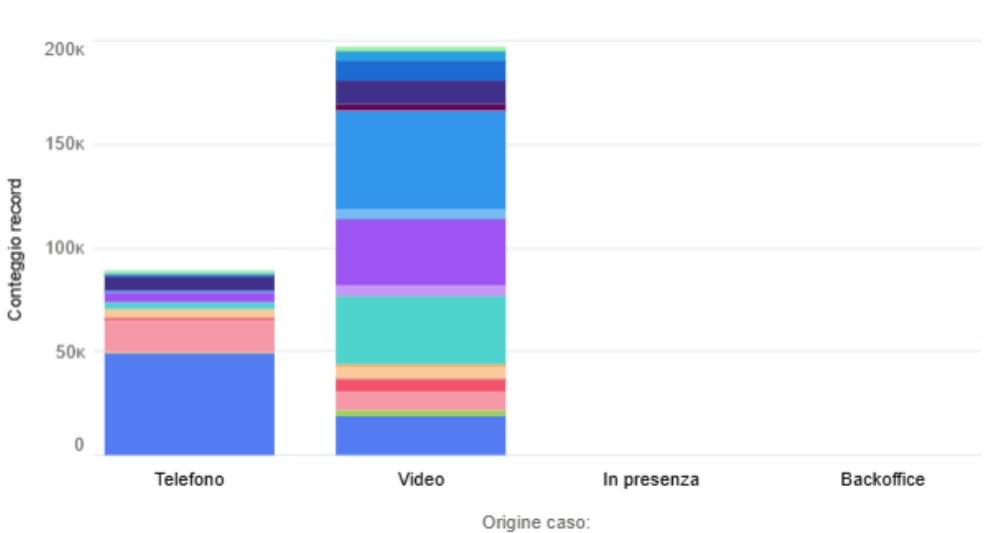


- Advanced video calls between taxpayers and tax officials
- File exchange and document sharing during sessions
- Screen sharing for guided assistance
- Step-by-step support to use web services

✔ Launched in late 2023, the virtual counter has been extended to approximately **8.600 officials** and **600 territorial offices**, with more than **322.000 user interactions** recorded to date.

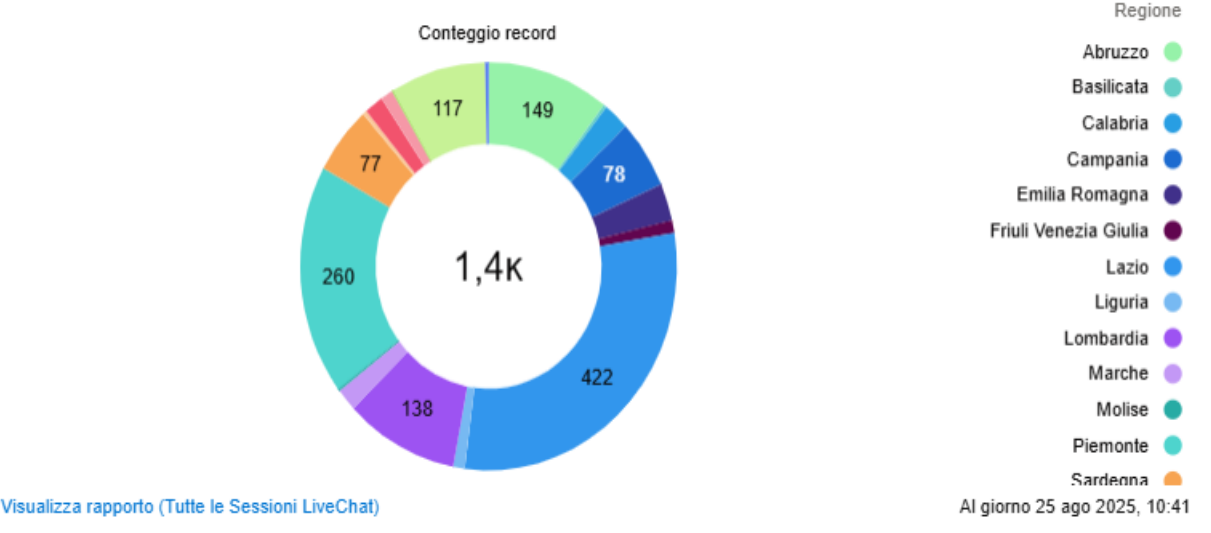


Casi per Canale Erogazione



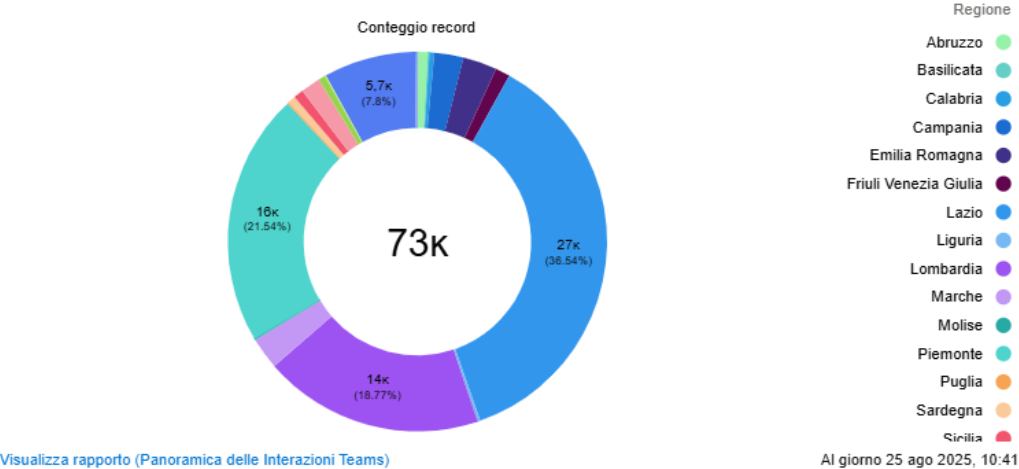
Visualizza rapporto (Casi per Canale Erogazione)

Tutte le Sessioni LiveChat



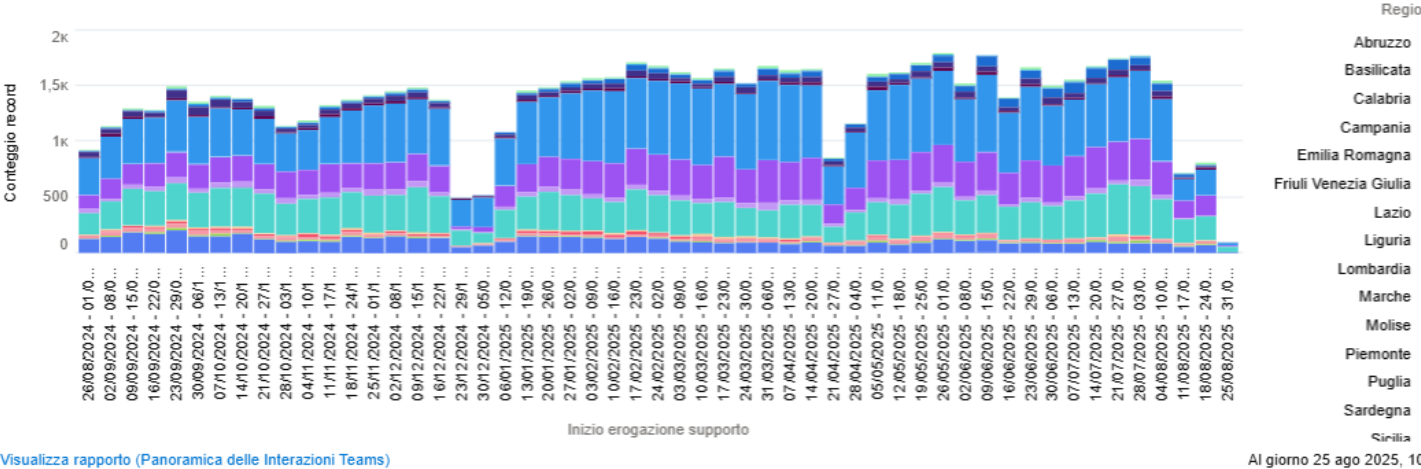
Visualizza rapporto (Tutte le Sessioni LiveChat)

Panoramica delle Interazioni Teams



Visualizza rapporto (Panoramica delle Interazioni Teams)

Panoramica delle Interazioni Teams



Visualizza rapporto (Panoramica delle Interazioni Teams)

Year-over-Year Comparison

2019

Dominated by in-person office visits
(10+ million)

Limited digital and remote options

2024

Significant drop in office visits (4.4
million) 56% reduction in physical visits

Growth in telephone support Multichannel
Assistance Service (2 + million)

Emergence of video calls (104,000)

Callbacks Service (800,000+)

Digital Messaging Channels (142,000) SMS
Service, webmail, social media engagement

2025 (by 31 July 2025)

Continued decline in office visits (1.5
million)

Strong telephone support (1.5 million)

Increasing video call adoption (80,000)

500,000 citizens had received scheduled
callbacks from agency operators

Digital text support growing (82,000+)

These figures demonstrate the successful shift toward digital and remote service channels while maintaining high service quality and accessibility.

The Future: Digital Signatures & AI Virtual Assistance

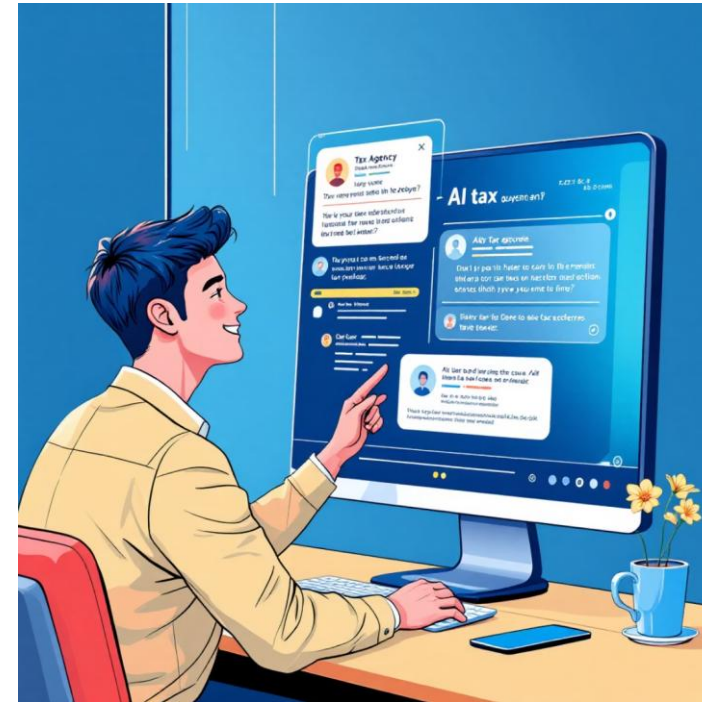
Digital Signature Integration

- Enables taxpayers to digitally sign documentation during remote sessions
- Instant issuance of 60-minute digital signature certificates
- Requires Public Digital Identity System credentials
- Initial trial in select regional offices by the end of 2025



AI-Based Virtual Assistant

- Provides operational support for assistance activities
- Specialized help for pre-filled tax return completion
- Trial began August 1st, 2025 in a Multichannel Assistance Section



These technological developments are further blurring the boundaries between assistance and service provision, creating new opportunities for efficient, accessible, and user-friendly tax administration.

Key Takeaways

Multichannel Evolution

Assistance and relations with taxpayers have evolved through online services, diverse contact channels, and remote support tools, creating a more accessible tax system.

Unified CRM Platform

Customer Relationship Management has become the central platform for managing taxpayer requests, enabling consistent service delivery and data-driven improvements.

Virtual Counter Innovation

This alternative to in-person appointments enables citizens to receive assistance via video calls, document exchange, live chat, and digital document signing.

AI-Powered Future

Virtual assistance based on artificial intelligence will help staff prepare responses to taxpayer questions, further enhancing service quality and efficiency.

The Italian Revenue Agency's transformation journey demonstrates how tax administration can become more citizen-centered through thoughtful design, technological innovation, and organizational change.