

Strategic Communications Plan: TrueRoll (2022-2024)

Prepared by: Megan Tonti, XX, XX, XX, XX

Annenberg School for Communication and Journalism, University of Southern California

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* Unless otherwise noted, information for this report was synthesized from meetings with TrueRoll leadership and from the TrueRoll website. Additionally, the term “county appraiser office” is used in this report to refer to county assessor offices and county auditor offices, depending on state, all of which can be classified as government clients. Moreover, “clients” and “customers” are used interchangeably to describe county property appraiser offices.

Defining Communication Goals

Introduction to TrueRoll

In 2011, the *Chicago Tribune* ran a story highlighting the amount of money Chicago was losing annually by paying out unqualified homestead exemptions. In many cases, people who had passed away years ago were receiving exemptions and other taxpayers were picking up the tab, resulting in an inequitable tax scenario (Walberg & Mahr, 2011). The founders of TrueRoll were struck by the inaccuracies of government processes and inspired by the story to revamp the tax roll system using big data and machine learning.

Founded in 2018, TrueRoll is a small, privately owned, venture-backed company. The company provides a real-time monitoring service to governmental clients to help maintain an accurate and up-to-date tax roll. The company does so by gathering data from several sources, including voter data, driver's license information, vacancy data from post office, and property information from Zillow. This helps identify homeowners whose homestead exemption eligibility changes, which minimizes inaccuracies in tax roll, finds new revenue for counties, and makes tax processes proactive and equitable.

TrueRoll's target clients are county appraiser offices in the seven states across the country that use a levy tax system: Florida, Georgia, Illinois, Indiana, South Carolina, Texas, Washington (FL, GA, IL, IN, SC, TX, WA). Because property taxes are run by county governments, the county appraiser's role includes calculating property value, collaborating with a commissioner to set county budgets, and working out property tax rates. Based on the diverse factors, counties grant property tax breaks (exemptions) that consider property value, and owner (debtor) qualifications. There are three qualifications that must be met in order for an individual to qualify for a property exemption: The homeowner must be alive, the property for which an exemption is in place must be the debtor's primary residence, and there can only be one exemption held by said individual across the United States.

Past processes to maintain accurate tax rolls by these states have been reactive and in the form of audits. Usually, county governments will hire an auditing firm to run an analysis of their constituents, gather data that points toward their exemption status validity, and determine whether any change in status has rendered the tax-payer delinquent. If such is the case, then a tax penalty is placed on the individual for the amount of time they received the tax break while no longer eligible. Depending on the period elapsed and the amount of the tax break, taxpayers can be subject to substantial penalties to be paid back to county governments.

TrueRoll recognizes and explains that property taxes are one of the biggest sources of revenue for the government and one of its citizen's biggest expenses. The company believes that if it can implement the auditing process correctly and effectively through county property appraisers, there will be significant positive benefits in terms of social equity. TrueRoll's solution allows governments to minimize costs incurred through the reoccurring auditing process, elected officials to identify new revenue, and private citizens to effectively uncover their tax benefit eligibility. While niche, inefficient auditing and spending large sums of money on audits is a sizable problem. The organization's purpose in providing this service is to push toward a higher

level of government transparency and equity via the usage of accurate data and streamlined processes. This goes hand in hand with TrueRoll's overall mission, which is to empower governments to use data science, perform at a more advanced level when it comes to auditing practices, and to create accuracy within the tax base. TrueRoll's vision is to automate the entire tax appraisal procedure in order to create more efficient, profitable, and equitable processes.

Identification and Explanation of TrueRoll's Strategic Goals

TrueRoll's perpetual strategic plan can be broken down into three parts: 1) Execute on existing customers; 2) Get new customers; and 3) Innovate and scale.

From a communications perspective, TrueRoll must facilitate a mindset shift by 1) creating **awareness** of its company and product across stakeholder groups and 2) creating **differentiation** that positions them as a multidimensional leader in the market. The company recognizes that, as an innovator, an intricate part of the role they play within the evolving GovTech market is disseminating knowledge across diverse stakeholder groups. The company wants to let stakeholders know that its real-time data solution is an alternative to the current penalistic, reactive approach of auditing every several years, then demonstrate that it is cheaper and more equitable to monitor properties as opposed to auditing and fining. TrueRoll's subscription system of ongoing book maintenance can create significant benefits in addition to the local government revenue that can be identified and saved.

By creating awareness and differentiation, TrueRoll aims to achieve the following financial goal: To achieve \$3 million in annual recurring revenue by the end of 2022 from subscriptions alone. The contingency-based work that the company does is not included in this and instead TrueRoll earns a percentage of what the governments collect from delinquent property tax exemptions. Currently, TrueRoll earns about \$700K a year in subscription revenue, with some contingency projects bringing in extra revenue.

Identification and Explanation of Strategic Communication Goals for TrueRoll

Stakeholders: County property appraisers (government), taxpayer population of counties in the seven target states

Strategic Communications Goal #1: Awareness

Over the next 24 months, communicate that there are issues with how counties in the United States maintain taxation records and administer exemptions (currently a penalistic, reactive approach with homestead audits conducted once every several years). Disseminate knowledge that empowers stakeholders to better understand the roles they play within taxation processes and to understand that there are better options available.

Strategic Communications Goal #2: Differentiation

Over the next 24 months, communicate that TrueRoll offers a solution that is innovative and the first of its kind, using data-science to create a proactive monitoring approach. Communicate the

benefits of local governments adopting TrueRoll’s proactive, sympathetic approach and how TrueRoll can lead toward a more equitable and accurate system through data-science solutions.

Position TrueRoll within the market as a leader not only in the solutions that it offers through its technological innovation, but also in the initiatives it pursues to create an accurate and transparent environment.

Demonstrate in numbers that it is cheaper to monitor the properties in a given county than it is to audit (this option will win with time).

Note: Communications goals work in tandem.

Explanation

Considering the organization’s perpetual strategic plan, TrueRoll already executes on existing customers and must continue delivering value (which is automated for customers). As TrueRoll scales and innovates, the company must increase revenue (goal is \$3 million annual based on subscriptions) by attaining new customers – which leads to the creation of awareness of TrueRoll and product differentiation. This is where TrueRoll should focus their attention and efforts within the next 24 months. By also generating awareness among taxpayers, TrueRoll can intertwine its solutions at a basic level and create demand as campaigns develop around revenue benefits for counties across the country. Therefore, the proposed strategic communication goals intertwine both awareness and differentiation to target TrueRoll’s growth and strength within its market.

Analysis

Environmental Analysis

In order to develop a communications strategy and plan, it is crucial to understand an organization within its environment, so that an organization can be responsive to external opportunities and threats (Cornelissen, 2020). As digital transformation catalyzes technology adoption, the government technology (GovTech) environment continues to see accelerated growth (Deep Knowledge Analytics, 2021). Within the everchanging GovTech ecosystem, it is necessary to identify and understand the variables that could impact a company’s strategy and its implementation (Mahoney, 2016).

SWOT/PEST

Table 1: *SWOT/PEST Analysis for TrueRoll*

<p>Strengths</p> <ul style="list-style-type: none"> ● Innovative technology that proactively monitors property data, keeping tax rolls current and accurate ● Specializes in niche market ● First to market 	<p>Weaknesses</p> <ul style="list-style-type: none"> ● Start-up is still in a trial-and-error stage ● Team roles continue to develop and need to be defined ● Standardized communication
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<ul style="list-style-type: none"> ● Product is not one-size-fits-all; company creates customized solutions for clients ● Start-up stage allows for quick adaptation ● Team size facilitates horizontal communication on a daily basis 	<p>processes are not yet in place to ensure centralized collaboration across departments</p> <ul style="list-style-type: none"> ● Niche market caters to a finite number of clients ● Product is not one-size-fits-all; the client has to understand how to use the tool
<p>Opportunities</p> <ul style="list-style-type: none"> ● TrueRoll has an opportunity to communicate that its product is a cost-effective solution to the homestead tax exemption problem ● TrueRoll, governments, and taxpayers all benefit from TrueRoll’s product ● The tax roll exemption accuracy market is available to TrueRoll ● TrueRoll can participate in most governments’ expedited contract process 	<p>Threats</p> <ul style="list-style-type: none"> ● Competitors have access to an extensive breadth of data and personal information that is out of reach for TrueRoll ● Up and coming vendors who claim they have the same technological blueprint as TrueRoll and copy messaging and approach ● Existing mindset of government that conducts traditional audits rather than proactive monitoring

Strengths. As a start-up, TrueRoll is already in a leadership position because its approach is innovative in a market that has been static for decades. As the technology industry continues to target government institutions, TrueRoll has an opportunity to infiltrate the GovTech market in the homestead niche. Its data-science solution presents benefits not only to local governments but its constituents, a stakeholder group that can be empowered and its influence leveraged towards demand of TrueRoll’s product/service. Due to the nature of the limited market in which it operates, the need for customized solutions also enables the company to create strong network bonds across the market to organically place it in a leading position.

The size and age of the company allows it to pivot quickly and adapt to its developing environment to learn and grow quickly, and at a lower cost than bigger enterprises. It can continue to learn from communicating with its customer base and continue improving and strengthening its outreach efforts as well as its customized solutions. Communication efforts across the team at the current size allows for foundational systems and processes to be established that take into account the overall vision of the company, where it is, and where it wants to be.

Weaknesses. At its current life stage, TrueRoll’s financial maturity can suffer from fund-consuming adjustments born from any mistakes made by the company. As the company pursues growth, it must also keep in mind its investor-seeking efforts and making operational or product adjustments too often may keep investors at bay despite its unique solution. As the team expands due to increasing demands of scaling the business, operational processes have not been adopted or implemented, which can hinder the organization’s efficiency. Considering the nature of government processes, TrueRoll’s product and service is facing the prevalent mindset built

through decades of a reactive solution (audits). TrueRoll's approach, then, cannot be standardized to accommodate lower costs but must be customized to each county, breaking preconceived notions against any solutions presented within the homestead market, and to abide by regulations that counties and municipalities are subject to. This customization need can accelerate a challenge for the company as it grows its clientele base across the seven target states. Furthermore, continued scaling also requires that the company assesses a larger body of stakeholder groups that may influence the market environment.

Opportunities. Because of its innovative approach, TrueRoll is in a unique position within its target market. Its high-tech solution allows the company to educate prospective customers on the benefits of adopting GovTech to simplify and make operations more effective and efficient. Due to the inherent political positions of TrueRoll's target customer, communication efforts can extend to their constituent bases to create further awareness and trigger a proactive response in which constituents are more invested in government processes. This public response can be leveraged to push politicians to seek TrueRoll's improved solutions toward more equitable taxation processes, while at the same time bolstering politicians who use TrueRoll's product as innovative leaders. TrueRoll's message can revolve around locating revenue sources for local governments and also highlight its cost-effectiveness, and justify its annual subscription budget model. Taxpayers then become direct beneficiaries of TrueRoll's efforts by the allocation of more finances towards public projects, identification of unclaimed homestead tax exemptions, and minimizing penalization for people whose exemptions become unqualified.

Finally, there is the sizable homestead tax exemption market which consists of seven states with around 400 counties combined. Because of the market size, TrueRoll has the opportunity to penetrate through the innovator population, early adopters, and into the majority at an accelerated pace (Perloff, 2020; Robertson, 1967). This can solidify it in a mature position within the market and allow it market dominance. TrueRoll's expansion opportunities are significant as it leverages relationships and the tight-knit appraiser community.

Threats. TrueRoll operates within the homestead tax exemption technology-based solutions, but its presence in data brokerage, which is the collecting and selling of information, is unavoidable and crucial for its operations. Within this data brokerage market, conglomerate corporations, such as LexisNexis, have dominated for decades. LexisNexis acts as a competitor because the company provides the same type of data TrueRoll utilizes for its services to LexisNexis clients. As new start-ups recognize TrueRoll's innovative advantage, they may attempt to imitate its technological blueprint and utilize these data brokers in order to act as competitors. As the GovTech sector continues to evolve, TrueRoll's technology runs the risk of not only imitation, but others improving upon the technology. As is inherent with any market, up-and-coming competitors can also copy any operational, strategic, or communication blueprints to strengthen their position within the niche market. Furthermore, given the characteristics of TrueRoll's target audience (political nature, the different needs of various counties, and possible external influences), TrueRoll faces possible misalignment if they use standardized messages with prospective customers and other stakeholders.

As TrueRoll evolves, it should continue to be aware of these threats because it is imperative for the company to intertwine its strategic goals of awareness and differentiation into its overall

efforts in order to preserve its market advantage and strength. By integrating differentiating characteristics not only into the technology-based solutions the company offers, but in how it operates internally and caters to its customers, TrueRoll can strengthen its corporate image.

Competitor Analysis

Within the part of the GovTech market that is focused on property exemption tax solutions, TrueRoll stands in a unique position. Because of its specialized service with innovative technology, TrueRoll does not have a direct competitor. However, there are companies that partake in the market and currently hold a large share of the GovTech market within the United States. These companies include data analytic companies (LexisNexis), tax management companies (Tax Management Associates, Incorporated), and law firms (such as Linebarger Goggan Blair & Sampson) working together to render property tax solutions. Through long-lasting relationships with each other, these partnerships have offered county governments homestead exemption auditing services for decades. According to stakeholders, TrueRoll's competitors include LexisNexis, Tax Management Associates, Incorporated (TMA), Linebarger Goggan Blair & Sampson, LLC (Linebarger), TransUnion, Deckard Technologies, and Name2Homes. TrueRoll's top competition is the collaborative efforts of LexisNexis, Tax Management Associates, LLC, and Linebarger. Tax Management Associates holds the largest market share within the homestead tax exemption auditing market. Deckard Technologies and Name2Homes are direct TrueRoll competitors but not seen as a significant threat at this time. See Table 2 for more information about competitors.

Table 2: *Competitor Analysis for TrueRoll*

Company	About	Target Audience	Location/ Founded	Size
TrueRoll https://www.trueroll.io/ https://www.linkedin.com/company/true-roll/about/	A revolutionary approach to homestead exemption audits. Empowering governments to maintain always-accurate property tax rolls by identifying both unqualified and unclaimed homestead exemptions -- generating new revenue and trust.	Local governments	Chicago / 2018	10
LexisNexis (Risk Solutions) https://risk.lexisnexis.com/ https://www.linkedin.com/company/lexisnexis-risk-	One of the largest market share holders in the risk and business analytics market segment; provides data analytics that include predictive insights and fraud prevention for a variety of industries, including government. Because of its size and the spectrum	Operates in 4 market segments: Insurance services, business services, health care services and	Georgia / 1970 (Lexis Nexis, not specific to risk solutions)	1,000-5,000

<p>solutions/about/</p>	<p>of solutions it aids within each of its current markets, the property tax exemption niche is not one in which the conglomerate invests innovative efforts on.</p>	<p>government services.</p>		
<p>Tax Management Associates, Incorporated (TMA)</p> <p>https://tma1.com/</p> <p>https://www.linkedin.com/company/tax-management-associates-inc/</p>	<p>*Lexis Nexis is a supplemental player for tax management companies, such as TMA.</p> <p>With LexisNexis as a partner, TMA has been able to assist local taxing officials by providing solutions in their day-to-day administration. TMA is recognized as a leader in aiding local and state governments with enhancing their revenue initiatives. By having specialized departments to help in a spectrum of tax-based practice areas, TMA offers comprehensive taxation solutions at the state and local governments. TMA operates within the property tax exemption market by offering auditorial services to local governments. Due to the analog systems that governmental operations utilize, tax rolls become inaccurate as taxpayers' exemption qualification changes due to changes in any of the necessary factors. TMA then offers periodical audits that bring tax rolls to date, finding revenue for governments based on tax penalties imposed on the constituents that have been under exemption when no longer eligible.</p>	<p>Local and state governments</p>	<p>Charlotte, NC / 1979</p>	<p>51-200</p>
<p>Linebarger Goggan Blair & Sampson, LLC (Linebarger)</p> <p>https://www.lgbs.com/</p>	<p>Once a company like TMA identifies those constituents that fall under tax penalty, a law firm like Linebarger Goggan Blair & Sampson, LLP acts as a collector. Linebarger at this point has served governments across the country for 42 years by providing a customized collection</p>	<p>Government at county and municipality levels</p>	<p>Austin, Texas / 1976</p>	<p>500-1,000</p>

https://www.linkedin.com/company/linebarger-goggan-blair-&-sampson-llp/	<p>program for government receivables at county and municipality levels.</p>			
<p>TransUnion</p> <p>https://www.transunion.com/</p> <p>https://www.linkedin.com/company/transunion/</p>	<p>TransUnion is a credit reporting agency and represents consumers in the marketplace by having an accurate and comprehensive picture of each person through credit and public record data.</p> <p>“Because of our work, organizations can better understand consumers in order to make more informed decisions, and earn their trust through great, personalized experiences, and the proactive extension of the right opportunities, tools and offers. In turn, consumers can be confident that their data identities will result in the opportunities they deserve.”</p>	<p>Businesses and consumers</p>	<p>Chicago</p>	<p>5,000-10,000</p>
<p>Deckard Technologies</p> <p>https://www.deckard.com/</p> <p>https://www.linkedin.com/company/deckard-technologies/about/</p>	<p>“We help local communities provide essential services by ensuring more equity and fairness in regulatory compliance. Applying advanced data analytics, machine-learning and the talents of our data scientists and engineers, we identify, monitor and analyze deep real estate data and activity to provide timely answers and information for local governments looking to manage real estate rental activity and property tax.”</p>	<p>Local governments</p>	<p>San Diego / 2018</p>	<p>11-50</p>
<p>Name2Homes</p> <p>https://www.name2homes.com/</p> <p>https://www.linkedin.com/company/name2homes/</p>	<p>“Name2Homes seeks to help counties identify the violators of the homestead exemptions in the counties that use Name2Homes. This allows counties to identify, fine, and collect on homestead violators. This creates an equitable system for law</p>	<p>County governments</p>	<p>2014</p>	<p>1</p>

y/name2homes/	<p>abiding homeowners, generates revenue for counties who have long overlooked violators due to the slow and arduous process that exists to determine who the violators are.</p> <p>It also allows reciprocity between states where these violators may have other homes.”</p>			
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Internal Obstacles

Internal obstacles that can impede successful implementation of a communication strategy include the fact that TrueRoll employees do not have clearly defined roles and responsibilities. Furthermore, clear communication channels to follow tasks through different departments need to be implemented to facilitate collaboration and follow-through. Another possible obstacle is that TrueRoll does not have a defined budget for sales and marketing, so the company spends money on those efforts on an ad hoc basis. This can hinder the organization’s ability to make decisions regarding which communications activities to pursue.

Stakeholder Analysis

Identifying stakeholders and considering the perceptions and implications of each is crucial to developing an effective communications plan (Berte & Vujovich, 2014).

Comprehensive Stakeholder List

1. County Appraiser’s Offices
2. Employees
3. Taxpayers
4. Investors
5. Competitors
6. Attorneys
7. Newspapers/Media

In order to best support TrueRoll and craft a successful communication strategy, the research team identified TrueRoll’s stakeholders. A power-interest matrix is a model that identifies the most important stakeholders based on their interest and power (Cornelissen, 2020). Mapping stakeholders helps to narrow down the scope of research. The team collected primary data on those deemed most important in terms of accomplishing the organization’s strategic goals. The stakeholders identified are listed in the power-interest matrix shown in Table 3.

Table 3: *Power x Interest Matrix for TrueRoll Stakeholders*

High Power	Keep Satisfied <ul style="list-style-type: none"> • Taxpayers 	Key Players <ul style="list-style-type: none"> • County Appraiser's Office • Investors • Employees • Newspapers/Media
Low Power	Minimal Effort <ul style="list-style-type: none"> • Competitors 	Keep Informed <ul style="list-style-type: none"> • Attorneys
	Low Interest	High Interest

Analysis of Stakeholder Matrix

“Minimal effort” stakeholders are those with low power and low interest. Right now, the only stakeholder listed is competitors. They can also be thought of as dormant stakeholders, since the competitors in TrueRoll’s market could have potential, but at the moment they have no urgent claim or power to enforce. In interviews, it was expressed that TrueRoll is one of the only companies that offers active taxpayer data monitoring. Other competitors primarily work off one-time contracts. The perception of the largest competitor, LexisNexis, is that they should not focus on homestead exemptions because it is a small fraction of their revenue stream. The implication is that, at this time, TrueRoll employees say they are monitoring the market for incoming competition, but little effort is needed in terms of competing for customers.

The “Keep Informed” quadrant consists of those with high interest and low power. In this section are attorneys, who are responsible for clerical work and receive percentages when filing exemptions for taxpayers. Attorneys’ perception is that they have high interest because they do not want the government to be accurate with its tax roll and take away from their work. The implication is that, since their power is low, they cannot stop the government from updating their records and communication should not focus on directly marketing towards them.

The “Keep Satisfied” quadrant means stakeholders are high power and low interest. This is where taxpayers are classified. The perception of taxpayers is they do not necessarily have interest in what system the government uses, but they want to maximize their money by either getting exemptions or knowing they are not paying the difference for other people’s tax exemptions. However, they have high power since TrueRoll’s customers, county appraisers, are elected officials voted upon by the taxpayers. The implication is that taxpayers must be kept satisfied because if they are not maximizing their benefits from local governments, then their interest could rise and they could enforce their power to remove elected officials from office or convince county property appraisers to consider becoming TrueRoll customers.

Lastly, the “Key Players” quadrant consists of high power and high interest stakeholders. The team identified several, including investors, employees, newspapers, and the actual customer (the county appraiser’s office). Starting with employees and investors, both have high interest. Their perception is they want revenue streams since their personal gains are dependent on the success

of any TrueRoll communication plans. Since the company is still a startup with only 10 employees, both groups hold significant power. Investors are the funders and must be appeased to continue to bring in capital. All employees hold director- or vice president-type positions and, therefore, can make large changes that affect the bottom line. Meanwhile, newspapers are powerful because TrueRoll customers are elected officials. The implication is that any negative press would strongly affect the customer and either prevent or sway them towards property tax reforms. Newspapers perceive homestead exemptions as interesting because taxpayers become upset if they learn they are not maximizing their returns. Homesteads can be big headlines. As mentioned earlier, a *Chicago Tribune* article demonstrated that exemptions were being administered improperly, and mistakes were being paid for by taxpayers (Walberg & Mahr, 2011). Newspapers opened the door for TrueRoll leadership to not only come up with the idea, but work with Cook County as a customer. This leads to the last key player, the county appraiser's office. At the end of the day, they are the customer, which gives them the most power in that they keep TrueRoll alive by purchasing its services. The key is to convince them their interest is high by determining what their interest is, whether it is to actually increase tax payer revenue or perform actions that keep them in office.

Primary Data Collection

The stakeholders that the research group analyzed for this project are taxpayers, employees, and the county appraiser's office. Researchers distributed a survey to 200 taxpayers in the seven target states through Qualtrics and Amazon Mechanical Turk, conducted interviews via Zoom with five TrueRoll employees, and interviewed via Zoom one former TrueRoll customer who used to work for one of the most populous counties in the United States (See Appendix A1, A2, A3 for primary data collection instruments). From taxpayers, researchers sought to learn more about whether or not taxpayers view homestead exemptions as an important issue and determine how they can become more invested. From employees, researchers sought to learn more about the vision of TrueRoll, as well as opportunities and gaps within the existing structure that may aid or impede the goals of communicating awareness and differentiation. From the former TrueRoll client, researchers sought to learn more about the factors that can prevent customers from transitioning to TrueRoll's product, what benefits of its product are most appealing, and motivations for being a TrueRoll customer. TrueRoll targets states with a levy tax system, of which there are only seven, making the market relatively small at this time.

Primary Data Collection: Taxpayers - Perceptions and Implications

Taxpayers were chosen based on their influence over elected officials. In an interview conducted with a former customer, they noted that the way to get to county officials is by framing the product as one that gets them votes. As such, taxpayers are incorporated into the proposed strategy as a possible asset to county appraisers since taxpayers have voting power that can be leveraged. Taxpayer concern can create pressure to differentiate how taxes are handled and awareness will spread. As for employees, TrueRoll leadership expressed that since the company is small, there is no centralized strategy for internal communication, sales pitching, or determining who speaks to external stakeholders. Interviewing employees gives insight into what has already been done and has been successful in order to incorporate it into a formal communication strategy that is replicable as TrueRoll scales its operations.

One hundred seventy-six taxpayers (89 males, 86 female, one prefer not to identify) were surveyed through Amazon Mechanical Turks. All were home owners in either Florida, Texas, Illinois, Georgia, Indiana, Washington, or South Carolina. A majority of participants were 35 to 44 years of age (31.6%), held a four-year college degree (57.1%), and lived in a three- to four-person household (63.8%). Most participants were from Texas (29.4%).

Of homeowners surveyed, most had heard of homestead exemptions (83.1%). An independent sample *t*-test found significance in receiving a homestead exemption positively affecting overall understanding of homestead exemptions $t(174)=-9.01, p>.001$. Similarly, there was a significant relationship between having paid tax penalties and better understanding of homestead exemptions $t(172)=-6.77, p>.001$. The implication is that those not receiving exemptions may not have an understanding of the requirements, or may not have received past penalties. The implications for the communication strategy include considering reaching out to taxpayers to inform them if they qualify or are on the precipice of potential violations, and educating them on homestead by providing them the exemption or providing possible one-time pardons. Ultimately, the strategy should position TrueRoll's product as one that not only identifies which exemptions should be revoked, but helps find new exemptions. This can be accomplished by educating taxpayers about exemptions they may qualify for, with the assumption they are more likely to vote for the elected official that helped them. However there was no significance between penalties and increased desire for tax reforms $t(170)=-2.56, p=.011$. Therefore, the conversation should not necessarily be focused on overhauling the system, as much as on helping teach taxpayers how they can maximize their own wallets.

Primary Data Collection: Employees and Customer - Perceptions and Implications

For employee stakeholders, four interviews were conducted. Each lasted 45 minutes to one hour. The interviews focused on employees' personal experience at TrueRoll, opinion on customer awareness, and differentiation from competitors. A general theme was that there is little perceived threat from competitors since most are not as developed as TrueRoll, such as Deckard Technologies, or are too big, such as LexisNexis, to pivot. For example, one employee said competitor LexisNexis sees homestead as a small money maker that will unlikely shift into TrueRoll's specialty. The implication is that, when communicating differentiation about TrueRoll, the point is not to differentiate from a competitor but from an overall process. TrueRoll is not differentiating from companies, but offering a different way to do taxes in general.

Overall, the interviews identified a consensus of TrueRoll's strategic goals of creating awareness and differentiation of TrueRoll and its data science solution. However, as strategy continues to form with the development of the team and company, there is a need for clear processes to define team roles and establish centralized communication that enables cross-departmental tasks. Roles, workflows, and communication channels are also not clearly defined. The implication toward the proposed communication strategy is to clarify leadership roles and responsibilities, and find effective channels to facilitate communication. Because of the current team size, TrueRoll finds itself in a position to adapt to changes as strategies are identified through efficiency. With its current culture being communication-centric, working towards refining communication and

operation processes would allow for efficiency through implementation of awareness and differentiation campaign efforts. This will also help raise awareness with customers.

In interviews, it was expressed that the most effective sales method was creating and maintaining relationships. With more defined roles, it will be easier to develop relationships since the company will have one familiar face or department that will always be handling sales, customer service, or technical support. Interviews also identified that strategies that have been effective in the company's outreach include face-to-face interaction, emphasizing relationship-building. Due to the close-knit county property appraiser community, especially within states, it is important for TrueRoll to build positive relationships with clients because a negative experience with even one client will spread quickly, leading to loss of business. Therefore, the one generalization that TrueRoll has utilized in its message design is a friendly approach with a stress on building connection. It is this initial engagement strategy that allows for demos and data presentations to speak for themselves as TrueRoll makes their differentiation pitch.

Other themes identified in the interviews were the strengths of having a small team, which include a tighter feedback loop between customer and delivery. Furthermore, the opportunity that social media can pose for exploring informal and friendlier interaction with this target audience is an avenue worth pursuing.

Of the one interview conducted with a former client, key learnings are to keep messages simple and that TrueRoll is selling to elected officials, and therefore needs to pitch its product in a way that assures elected officials that they will gain, not lose, voters. The implication is the need to avoid jargon in sales pitches and find opportunities to phrase communications that becoming a TrueRoll customer is a way to support the political needs of public officials.

Critical Success Factors

Critical factors for successful implementation of a communication plan include a well-defined company structure. Although TrueRoll has already established a culture based on healthy communication practices, it needs to implement clear and replicable communication processes that allow the team to grow as the company scales without compromising its effectiveness. Identifying channels or tools that will facilitate centralized, bird-eyed, and cross-departmental communication and cooperation is crucial. As TrueRoll leverages its size as a part of its differentiation strategy, then it must live up to this through change and growth. Part of this structurization includes clarifying role responsibilities. In order to optimize a communication plan, roles that will be spearheading tactics must be clearly defined so as to minimize redundancy or neglect. Furthermore, allotting a budget for tactic implementation and for overall communication efforts should also be a process adopted by TrueRoll as it begins to enact operational processes.

TrueRoll has been able to identify that building relationships with customers and prospective customers has proven success and served as the premise of their outreach efforts. As the company continues to leverage those relationships, it is crucial that prioritization of both outreach channels and potential markets occurs in consensus. Messaging, then, can be designed to align with those identified prospects, to distribute through the chosen dissemination channels,

and to serve for the purpose intended (to educate, to sell, follow up, etc.) and immediately communicate the value that TrueRoll offers.

Implementation and Analysis

Introduction

The implementation process of the communication plan is essential for TrueRoll to effectively and successfully work toward the strategic company goals that have been previously identified, which are awareness and differentiation. TrueRoll must garner awareness amongst taxpayers and elected officials on homestead exemptions and the data science solution, as well as differentiate the organization as a financially sound option in comparison to costly audits. As Cornelissen (2020) states, "the core of corporate branding is the alignment between the company's vision, culture, and image" (p. 96). The company's vision refers to senior management's aspirations, while culture refers to the organization's values according to employees, and image refers to the perceptions of outside stakeholders. Developing and managing TrueRoll's corporate image is fundamental because it helps identify characteristics of the organization, and can align itself to appeal to key stakeholders (Melewar & Jenkins, 2002). With that said, the organization's corporate image will play a vital role in the success of the goals because of the impact it could have on the organization, as it creates awareness, while also instilling confidence among its stakeholder groups (Cornelissen, 2020). In turn, this could have a direct impact on TrueRoll's success by retaining its clientele, and expanding its services to other counties.

TrueRoll's strategic messaging should convey how the company wants to be recognized by key stakeholders (Cornelissen, 2020). This can be done through theme messaging, which will aid in achieving TrueRoll's strategic goals (Cornelissen, 2020). The communication objectives that have been identified for the organization are in relation to educating the public about property taxes, conveying the importance of defining and implementing an internal team structure, as well as expanding the dialogue between key stakeholders by establishing a communal platform. To execute these ideas, it is recommended that TrueRoll uses rational and generic messaging styles. Cornelissen (2020) states that a rational messaging style distinguishes itself from the competition, which as stated, are auditors and companies such as LexisNexis. The content of the messaging will include claims that are supported by sensible information (Cornelissen, 2020). In addition, TrueRoll should implement generic messaging, which is described by Cornelissen (2020) as claims about a specific industry without superiority. This messaging consists of general claims that would best suit the communication between stakeholders on a social platform in which key stakeholders can communicate with each other.

The team will dive into 3 communication objectives:

1. Defining Internal Team Structure
2. Public Education Campaign
3. Creating a Community of Practice

For each objective, the team will present the following information:

1. Description of objective: Describes the objective for tactics recommended.
2. Rationale: Set of logical bases for recommended objectives and tactics.

3. Collaboration plan: This maps out the key people involved and their roles in implementing the communication objectives.
4. Communication themes: List of themes that should be included and observed throughout objective messaging design.
5. Messaging: Breaks down messaging design for each objective.
6. Overview of communication channels and activities
7. Budget: The team provides estimates for how much each objective will cost to implement, as well as a total budget breakdown at the end of this report.
8. Timeline: Timelines for these objectives start at the beginning of 2022 and are generally based on a 24-month period, with some objectives associated with more detailed breakdowns.
9. Definition of success
10. Measurement of success

Communication Objective #1: Defining Internal Team Structure

Communicate the value of defining and implementing an internal team structure that includes clear responsibilities based on respective roles in order to ensure consistency and improve efficiency in company operations.

Rationale

One repeated note researchers heard during employee interviews was that employees often take on tasks that are outside of their main roles. For example, engineering and sales tasks should be separate (though all sides should be tuned into the happenings on “the other side”). While this collaborative approach can work while the company is smaller, it can become confusing and inefficient as TrueRoll gains new clients because the company must have a solid structure in place to accommodate that growth; in fact, an article published by the *Harvard Business Review* states that “collaboration improves when the roles of individual team members are clearly defined and well understood” (Erickson, 2012). Operating from a sound framework will allow TrueRoll to optimize team efficiency and maintain its personable approach strategy without compromising company development. Further, the roles are not meant to be prescriptive but rather provide structure. Having this framework in place is also critical for implementing any communication plan.

Table 4: *Collaboration Plan for Communication Objective #1; Defining Internal Team Structure*

Collaborator(s)	Explanation
TrueRoll Leadership	It is critical that TrueRoll leadership spearhead this communications objective and provide reassurance to employees throughout the process that defining company team structure is a collaborative process involving everyone.

	<p>TrueRoll leadership must identify the tasks that they believe each of their team members should own (through their leadership perspective) and reconcile with the current tasks that team members are responsible for (through talking to their employees) while communicating the value of the endeavor.</p>
<p>TrueRoll Employees</p>	<p>Employees at any given company are important stakeholders. Indeed, "an engaged workforce is offering a competitive advantage to employers" (Linjuan Men & Bowen, 2018, p. 165). Why? According to Cornelissen (2020), "communicating routinely and effectively with employees is linked to employee commitment, productivity, job performance and satisfaction, as well as to a significantly lesser likelihood of employees leaving the organization" (p. 176). Adding onto that, "internal communication ... has the potential to foster communication, trust, and engagement among employees" (Ewing et al., 2019, p. 111).</p> <p>TrueRoll employees must be part of this process; it is crucial to attain their buy-in and understanding of how defining the company team structure will benefit them as individuals and the company as a whole. Furthermore, involving employees in the process will reduce the likelihood of surprises, discomfort, and employee dissatisfaction.</p>

Communication Themes

- **Empowerment:** By defining and implementing a clear internal team structure and rolling out specific job descriptions, TrueRoll is empowering its employees to own their respective roles. Employees are then able to contribute to the company's efforts with confidence and clarity, strengthening TrueRoll's profile. This supports the overall communications goal of creating differentiation of TrueRoll in the market.
- **Accuracy:** If the team knows how each role works, they are better able to coordinate and collaborate with each other, as well as provide customers with clarity about how the team operates. By differentiating themselves internally and increasing accuracy of its operations, TrueRoll is also differentiating themselves in the service and solutions the company provides to customers.

Messaging

According to a *Harvard Business School* article, four steps used to communicate change are sharing a vision, telling a story, making those in an organization heroes, and charting the path (Ricks, 2020). Given that, here are the messaging recommendations.

First, it is important to communicate to employees why this change (of clearly defining the internal team structure) is necessary and to reassure team members that no one is getting laid off, the process will be collaborative, and that this endeavor will strengthen the team. A message example could be: We recognize that it is not always clear who owns specific tasks and that everyone pitches in where needed, which sometimes leads to overextending your bandwidth. By clearly defining our internal team structure, we can help alleviate some of that burden and maximize efficiency for ourselves and our customers. No one is being let go, we are simply working together to figure out everyone's roles and the work responsibilities that fall under each of you. This will create accuracy within TrueRoll.

Second, leadership should express how a defined internal team structure benefits TrueRoll's future as the company acquires new customers and must be able to keep up with the demands of an expanding customer profile. A message example could be: TrueRoll is growing, both in terms of how many customers we have and our company team. In order to provide high-quality customer service and keep our team working well together, we need a strong, accurate foundation to lean on.

Furthermore, TrueRoll employees are being given an opportunity to speak up about their roles and what they believe they should focus their time on. A message example could be: We want to empower all of you. Conversations with you individually and as a group will give you an opportunity to provide input as we define everyone's roles and we will keep communication channels open as we roll out the defined structure to ensure that it is working for everyone.

One note that the researchers want to communicate to TrueRoll leadership is that, by positioning employees to be independent in their roles, leadership can take on more supervisory roles versus needing to do a little bit of everything within the company (eg, populating social media with content). Moreover, TrueRoll can get a sense of how roles may evolve as the company scales.

Overview of Communication Channels & Activities

1. Zoom and Slack
 - a. Host meetings and conversations about defining the internal team structure.
2. Existing file-sharing system (eg, Google Drive, Box, Dropbox) -- emphasize proactive approach internally by transparently sharing information about each person's role and the company's behind-the-scenes processes.
 - a. Put into writing each team member's role
 - b. Create organizational chart that visually displays who reports to whom, the teams within the company, where there are areas where resources are needed (eg, could consider hiring an intern)
 - c. Draft and refine process documents, including for employee onboarding and human resources, and how to complete various tasks within roles (eg, how to prepare for conferences); process documents to be revisited and updated quarterly
 - d. Also add SurveyMonkey results here for visibility (see assessment plan for more information)

Table 5: Budget for Communication Objective #1; Defining Internal Team Structure

Item	Notes	Cost
Part-time human resources staff member or intern	Average base salary for interns is \$14.47/hour (Indeed, 2021a; Chicago Gov). This translates to ~ \$30,000/year for a full-time intern and the team suggests hiring an intern for 20 hours/week.	\$15,000/year
SurveyMonkey subscription service	Tiered pricing ranging from \$25/month to \$75/month for business plans, depending on analytics features. The team recommends the \$25/month option to start.	\$300/year
Estimated budget (yearly)		\$15,300

Table 6: Timeline for Communication Objective #1; Defining Internal Team Structure

	Timing	Action Item(s)
Immediate	January 2022	Initiate the process and start having conversations about defining the internal team structure.
Intermediate	End of Q1 2022	TrueRoll leadership continuously communicates about the internal team structure and write out ideal responsibilities for people's roles; employees map out their own roles; conversations about how to get to ideal state.
Long-term	Ongoing	Consider hiring human resources intern; roll out defined internal team structure and keep documents in shared drive updated.

Definition of Success

With the successful implementation of a clearer internal structure, employees should have a stronger sense of what their role is in the company, their expectations for performance, and how their roles impact other departments. Success will be measured by an employee's confidence in defining not only their own role but others as well. Defining their role is determined by their

ability to assess their own responsibilities and contributions. Defining the roles of others is assessed by their ability to understand the functions of other roles in the workflow and who to contact for various issues.

Measure of Success

Success will be measured through surveys. Prior to operating within the defined infrastructure, a survey will be administered to all employees measuring their confidence in defining their own role and their confidence in defining other roles at the company. During the first fiscal year, the survey will be readministered on a quarterly basis. A successful implementation will show increased confidence on each quarterly survey.

After the first year, the survey should be continued on a bi-annual basis for existing employees. The company is in the process of scaling and this will continue to affect the company structure, so in this time of growth, measuring role confidence should be done more than once per year. For new employees, the survey should continue quarterly. The first survey for new employees should be administered during onboarding. While new employees will not have performed job functions yet, it is important for them to understand in the long run whether new employees have a strong sense of what role they applied for and are expected to fill.

In terms of metrics, the survey includes questions on a 5-point continuous scale. Example questions could be “How satisfied are you with your role?” or “How well do you understand what is expected of you?”. The company should then use paired samples t tests on an analytics software such as SPSS to compare means between the survey that was taken before the change and the one they are analyzing. A bad metric would be if the scores on these questions are less than or equal to what the person said on the first survey. A good outcome would be increased scores, but are insignificant when the paired samples t test is run. An excellent outcome would be scores significantly increased.

The team’s recommendation at this time is for the survey to be administered via SurveyMonkey. SurveyMonkey is a service that allows companies to easily create polls, surveys, and other assessments and administer them internally through emails, links, and QR codes. The service also provides basic analysis tools that will create visuals of the results, allowing for easy assessment of results (SurveyMonkey, n.d.).

Communication Objective #2: Public Education Campaign

Educate the public, particularly taxpayers, by communicating about property taxation practices, homestead exemptions, the role government plays within these, and the solutions to the issues that TrueRoll offers.

Rationale

Awareness of taxation processes can empower the taxpayer stakeholder group with knowledge while at the same time differentiating TrueRoll as a company that takes the time to launch and

facilitate a social-education initiative. In empowering this particular group, taxpayers, TrueRoll can prompt change from taxpayers being a latent stakeholder group into an expectant stakeholder group (Cornelissen, 2020). Increased awareness and interest by this group can leverage existing stakeholder power towards fulfilling TrueRoll’s strategic goals of awareness and differentiation. That is, by providing the public with knowledge about how the government can utilize a solution that will not only be beneficial to the government but to the taxpayer, the group can expect and push for change within their local governments to seek the more efficient solution -- TrueRoll. This shift can help in customer retention and engage prospective customers because gaining taxpayer support can create an advantageous correlation with election campaign success as constituency expectations change with knowledge (Cornelissen, 2020).

Furthermore, as TrueRoll introduces an innovative data solution to the market that affects not only its primary target consumer but other stakeholders, it is important that the company takes into consideration these groups in the diffusion of innovation process. In order to facilitate adoption success, breaking down what the data science solution is, what it does, and how it affects these stakeholder groups can promote adoption by the innovator population. Given the anachronistic nature of present government processes and operations, simplifying high-tech solutions not only for the customers, but also for other stakeholders that can directly push customers into action, has the potential to accelerate innovation diffusion and innovation (Robertson, 1967). This campaign can accelerate adoption through the first innovator population and early adopters and towards maturity in the market through majority adoption (Robertson, 1967).

Table 7: Collaboration Plan for Communication Objective #2; Public Education Campaign

Collaborator(s)	Explanation
Social Media Director	(New role within TrueRoll) Will serve as campaign leader. This point of contact will coordinate with the director of sales and marketing, marketing manager, exemptions investigator, CEO, and VP of homestead to create educational content taking into consideration the different audiences that may come across the campaign.
TrueRoll CEO	Will collaborate with the social media director to coordinate the budget.
TrueRoll Marketing Manager and Customer Success Manager	Will liaise with counties that are already serviced by TrueRoll and also prospective client counties. This collaboration will allow the campaign to intertwine reports of results that inform the audience of benefits and changes brought on by TrueRoll’s solution; for example, success stories that not only show the benefits of TrueRoll for the local government agencies but at the taxpayer level. These will be in accordance with what the local governments want to make public and their goals within their constituency.

County Property Appraiser Offices	Will coordinate success stories to highlight the benefits at the institution level and at the constituent level. Appraisers can further help design messaging that is in accordance with governments.
TrueRoll Team	Will identify what information about the company, property taxes, and homestead exemptions to share throughout the public education campaign.

This collaboration will ensure that the campaign is in line with leadership strategic goals and is consistent with company direction.

Communication Themes

- **Social equity:** TrueRoll’s vision has been guided by a recognition that, on a national level, every jurisdiction has historically overtaxed their low-income population and under-taxed their high-income population. With this, TrueRoll explains that property taxes are one of the biggest sources of revenue for the government and one of the citizen’s biggest expenses. The company believes that if they can implement the auditing process correctly and effectively through county property appraisers, there will be significant positive benefits in terms of social equity.
- **Innovation:** Government operations can greatly benefit from developing technology. Presently, property taxation practices are antiquated and have conceived expensive solutions, such as the tax roll audit approach. TrueRoll then differentiates itself not only through its data science solution, but also in the initiative to take a public-oriented approach to resolving these issues.
- **Inclusion:** Making the general public part of the stakeholder group that has legitimacy and urgent claims empowers taxpayers to push their elected officials in government as their advocate towards change.

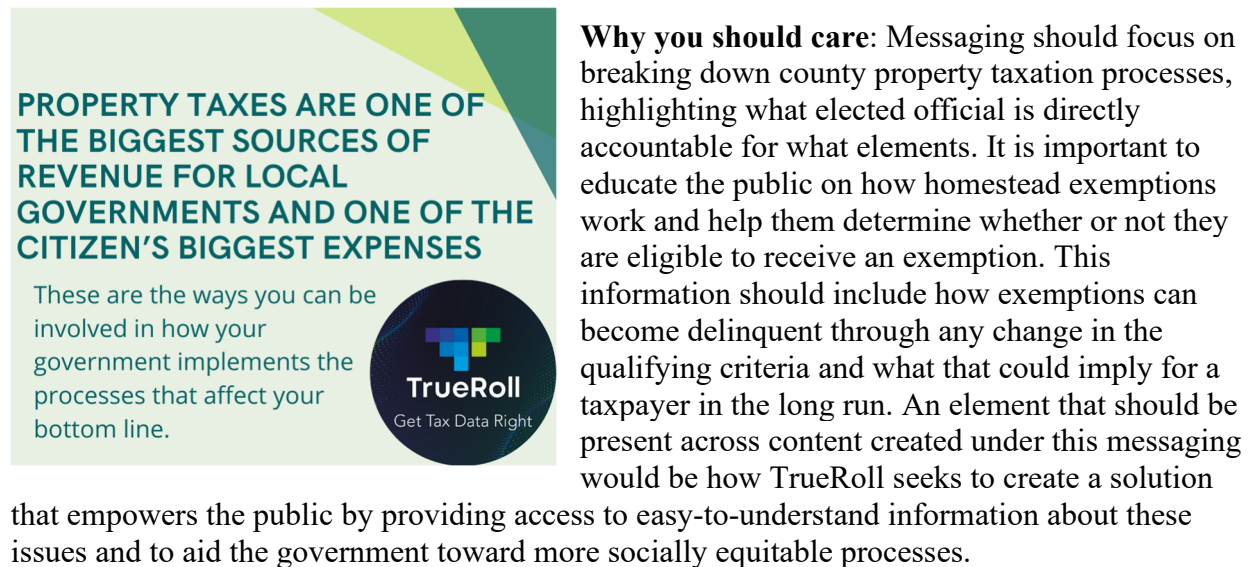
Messaging

TrueRoll should communicate in a way that is engaging and establishes content that raises interest, awareness, educates the public on the property taxation practices in place, what implications these practices have for the taxpayer, how the taxpayer can have a more proactive role in these processes, and how a data science solution can address many of the concerns across the table.

Because of the campaign's digital development, messaging should be designed in a way that draws in the general public by engaging their basic processing routes through peripheral cues and fundamental argument content (Perloff, 2020; Cacioppo & Petty, 1986). Heuristics become an important element of the campaign and can be leveraged through social media to initiate contact with the intended audience, while at the same time engaging the central processing route through well-founded and fact-based information that is easily accessible and understandable (Perloff, 2020). Messaging should then include careful design through personal relevance, factual information from credible sources, and peripheral cues that will allow the audience to engage

with the message through one processing route or another (central or peripheral) to ultimately create awareness (Perloff, 2020). Here are some messaging examples:

Figure 1: *First Messaging Example for Communication Objective #2; Public Education Campaign*



Why you should care: Messaging should focus on breaking down county property taxation processes, highlighting what elected official is directly accountable for what elements. It is important to educate the public on how homestead exemptions work and help them determine whether or not they are eligible to receive an exemption. This information should include how exemptions can become delinquent through any change in the qualifying criteria and what that could imply for a taxpayer in the long run. An element that should be present across content created under this messaging would be how TrueRoll seeks to create a solution that empowers the public by providing access to easy-to-understand information about these issues and to aid the government toward more socially equitable processes.

Figure 2: *Second Messaging Example for Communication Objective #2; Public Education Campaign*

Did you know? Present facts about the property taxation processes that are in place across target states and what that looks like. Present each question with a lead towards a solution provided by TrueRoll's data-science solution. Here are a couple of Instagram handles that may be useful to take a look at and model posts from: @so.informed, @personalfinanceclub.

This formula includes the intended audience by engaging critical thinking while at the same time offering the importance of what TrueRoll offers in answering the underlying issues presented. Through incorporating TrueRoll's solutions at the end offers an actionable – towards finding out how the taxpayer can use their influence on the government to seek more efficient processes.



Did you know that in order to qualify for a homestead exemption in FL:

- 1.) The debtor/owner must be a permanent resident of FL**
- 2.) The homestead property must be the debtor's/owner's primary place of residence?**

What happens if one of these changes? Then you could be subject to a tax penalty. TrueRoll's solution seeks to minimize tax payor penalties through actively monitoring exemption qualification criteria, helping local governments and tax payors alike.

Overview of Communication Channels & Activities, Phase 1

For the initial phase of campaign implementation, a digital-based distribution would be the most efficient and realistic for TrueRoll to deploy. It would start by addressing its home website in order to accommodate information geared towards a public audience. That is, TrueRoll would have to provide resources within its website that offers in-depth information about states and counties that are within their target and how property tax processes work within each. Campaign dissemination channels would concentrate around social media platforms that are majorly used by the target audience.

With the average homeowner being between the ages of 38 to 52, Instagram, Twitter, and Facebook would be the platforms that host the majority of users within that demographic (Pew Research, 2021; Bettinelli et al., 2021). Furthermore, Instagram and Facebook have been found to be the primary sources of innovative information. When users across platforms seek to find information about a new product or service, they utilize Facebook and Instagram to serve as the primary social media platform sources (Bettinelli et al., 2021). By utilizing social media platforms, TrueRoll can present complex topics and break them down alongside visuals that engage users in an ongoing conversation about diverse subjects within the communication objective. These platforms further allow TrueRoll to leverage word of mouth across networks to garner an organic audience in target states. Working with counties could enhance user engagement if county officials share the content through their own social networks.

As these channels are developed and established, TrueRoll can engage with media outlets to create public awareness of the education campaign efforts by the company. These can include newspapers, such as the *Chicago Tribune* and the *Miami Herald*, alongside industry blogs and reporting channels. Existing connections with media outlets can be leveraged in order to help disseminate the information shared on social media platforms and also to highlight the initiative that TrueRoll is undertaking with empowering the taxpayer to be an active stakeholder within their local governments (Cornelissen, 2020). In an era when GovTech can catapult government operations to become more effective, accurate, and transparent, TrueRoll can become a leader not only in the solutions market but also in the approach that it utilizes to build awareness accessible to multiple stakeholder groups.

Overview of Communication Channels & Activities, Phase 2

For the second phase of the campaign, contingent on the success of the first phase and measured by indicators described below, TrueRoll can expand to a multimedia campaign. Partnerships could be established with institutions beyond the county offices and include industries that are intertwined with property taxes. The personal property insurance, tax preparation agencies, and real estate industries could be key partners in further educating the public about property taxation practices in their given states at pivotal points: For example, realtors play a key role during the purchase of a home and could provide materials about “things to know as a new homeowner” and could distribute resources put in place during phase 1 of the public education campaign. Insurance agencies can further assist in this distribution of information due to the nature of their involvement both at property purchase and at end-of-life notifications. Printed material for the

campaign can further specify steps to follow in the case that the property owner has passed away and an exemption must be confirmed or changed.

To further develop this effort, TrueRoll can establish a YouTube channel that presents informational videos about what to do in a given scenario. These videos would serve to further educate the public about property taxes and can do so with an instructional tone. TrueRoll can help the public become aware of who to contact if an update needs to be made on a deed, where to update any status that would then change someone's exemption status, and what elections are coming up in counties that could affect the way property taxes are handled.

Table 8: Budget for Communication Objective #2; Public Education Campaign

Item	Notes	Cost
Social Media Director	Yearly average salary is \$76,056 (Glassdoor, 2021)	\$76,056/yearly
Website designer needed for redesign	One-time cost	\$10,000/one-time (Freshbooks, 2021)
Software (creative)	Advanced software to create content; \$49/month	\$590/year (Hootsuite, 2021)
Social Media Team	Interns/New hires; \$0-15/hour (budget below calculated with an intern earning \$15/hour and working 40 hours/week)	\$31,200/year for intern
Multimedia resources	Printed material/partnerships	\$20,000/year (Tobin, 2021)
Total estimate (yearly)		\$137,846

*This public education campaign is not contingent on all suggested expenses listed.

Timeline

The public education campaign will be implemented within a 24-month timeline. It is necessary that, at this point, leading and executing positions, such as the Social Media Director, be in place in order to incorporate action items that arise throughout its implementation.

Table 9: Timeline Communication Objective #2; Public Education Campaign (Phase 1)

Public Education Campaign (Phase 1)	
Timing	Action Item(s)
Quarter 1 (2022)	<ul style="list-style-type: none"> ● Update TrueRoll website in order to accommodate the general public as an amateur audience. ● Gather credible data sources to allow for additional resources to be readily available. ● Launch public Instagram, Facebook and Twitter platforms with 1 month of pre-created content scheduled to post daily for the first month. ● Engage mass media to earn or pay for dissemination of campaign efforts across multiple channels. ● Identify the algorithm for posts and reels that works best for the intended audience within each platform so that content remains visible and engaging. ● Adopt a posting schedule that meets the algorithm requirements in order to maintain visibility.
Quarter 2 (2022)	<ul style="list-style-type: none"> ● Assess social media analytics, including audience engagement and followers within target states and demographics. ● Assess organic growth and identify traffic correlation with earned or shared media. ● Engage with current client counties to create content that will align with their appraiser office goals and objectives. ● Reassess algorithm patterns for platforms in order to maintain visibility.
Quarter 3 (2022)	<ul style="list-style-type: none"> ● Consider onboarding a social media team in order to collect data from social media platform analytics and measure the success of the campaign, as well as keep a record of the expected outcomes and suggest adjustments should the data indicate the need to do so. ● Assess social media analytics, including audience engagement, followers within target states, and demographics. ● Assess growth and identify traffic correlation with earned media (eg, article written about TrueRoll) or shared media (eg, county property appraiser's office sharing social media posts). ● Make posting schedule adjustments according to indicators of success or indicators of needed change.
Quarter 4 (2022)	<ul style="list-style-type: none"> ● Assess social media analytics, including audience engagement and followers within target states and demographics. ● Assess growth and identify traffic correlation with earned or shared media. ● Assess social media analytics, including audience engagement, followers within target states, and demographics.

	<ul style="list-style-type: none"> ● Assess organic growth and identify traffic correlation with media coverage. ● Identify engagement activity based on target counties. ● Assess end-of-year tax penalties per county. ● Assess client volume per state.
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Table 10: Timeline Communication Objective #2; Public Education Campaign (Phase 2)

Public Education Campaign (Phase 2)	
Timing	Action Item(s)
Quarter 5 (2023)	<ul style="list-style-type: none"> ● Analyze yearly assessment of phase 1. ● Consider budget allocations to further expand on efforts including printed media, growth across social media, partnerships, and other possible channels. ● Create pre-designed content to launch a TrueRoll YouTube channel. ● Launch TrueRoll YouTube channel and link content across other social media platforms to engage current audiences. ● Establish budget for possible multi-media campaign expansion. ● Begin seeking possible partnerships with local realtor offices and insurance agencies to grow campaign reach.
Quarter 6 (2023)	<ul style="list-style-type: none"> ● Assess social media analytics, including audience engagement and followers within target states and demographics. ● Assess growth and identify traffic origins correlating to target counties (current customers versus prospective customers). ● Engage current customer county appraisers to talk about taxation practices in their counties and the importance of transparency and equity. Highlight what TrueRoll has done to make government more efficient. ● Disseminate material to partnering agencies both in digital and print form. ● Partner with them through social media collaborations (cross marketing).
Quarter 7 (2023)	<ul style="list-style-type: none"> ● Assess social media analytics including audience engagement and followers within target states and demographics. ● Assess growth and identify traffic origins correlating to target counties (current customers versus prospective customers).
Quarter 8 (2023)	<ul style="list-style-type: none"> ● Assess social media analytics including audience engagement, followers within target states and demographics. ● Assess growth and identify traffic origins correlating to target counties (current customers versus prospective customers). ● Assess social media analytics including audience engagement, followers within target states and demographics.

	<ul style="list-style-type: none"> ● Assess growth and identify traffic origins correlating to target counties. ● Assess end of year tax penalties per county. ● Assess client volume per state. ● Deploy property tax/homestead knowledge assessing survey.
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Definition of Success

The purpose of educating taxpayers and the general public on homestead tax is, as previously stated, to mobilize them as a powerful force for change in the tax assessment market. To successfully leverage taxpayer power, taxpayer interest, awareness, and knowledge must increase. A successful educational initiative will be one in which taxpayers feel they have more self-efficacy in how their taxes are assessed. Self-efficacy is defined as a taxpayers' ability to feel they personally can make a change or difference that would help themselves (Kim & Ferguson, 2018). According to TrueRoll leadership, taxpayer self-efficacy was low. Since taxpayers had little knowledge of whether they qualified or were unqualified, they had little ability to claim or reject exemption. If successful, the educational initiative will teach taxpayers whether they qualify or not, and empower them to manage their exemption.

Measure of Success

Success will be determined by taxpayers' ability to discern whether or not they qualify for exemptions. Success is measured by their increased ability to either file for eligible exemptions or request changes to their exemption status.

The first measurement looks at self-efficacy, whether or not taxpayers are acting on their increased knowledge. This will be measured every year when taxes are filed and claims are made. In states like Illinois, forms such as a PTAX-323 are filed to claim benefits (State of Illinois, n.d.). The first measurement is how many claims are filed each year and what percentage of those claims actually qualify. The expectation is that there will be an increase each year as the public education campaign continues in both total claims and eligible claim percentage.

The metric analyzed for the first measurement is change in taxpayer exemption status. Since the timeline is 24 months, an excellent result would be if 75% of those taxpayers who are eligible for an exemption have claimed their exemption. A good result would be if 25% to 75% changed their exemption status. An unsuccessful result would be if less than 25% of those taxpayers who are eligible for an exemption have claimed their exemption.

The second measurement would be how many people recognize they are no longer eligible for an exemption, whether that is the result of moving, change in ownership, or other. There could be multiple ways for a taxpayer to try to update their exemption status, such as emails, calls, and forms, so all methods will be aggregated. Per TrueRoll leadership and interviews with staff, one of the major drivers for the company's creation was that it is unfair for people to be penalized for claiming exemptions that they did not know they were not eligible for. This was common due to the counties' lack of validity among their records. Increased knowledge would lead to increased ability to know one does not qualify. So, the initiative will want to see a yearly increase in total

requests to update exemption status and a decrease in the number of penalties handed out yearly based on homestead exemptions.

The metric for the second measurement is yearly change in total number requests to update exemption status. A successful metric will show continued increase over two years. A good metric would be an increased request in only one year. An unsuccessful result would be if there was no change over two years or any year saw a decrease in request from the previous year.

Communication Objective #3: Creating a Community of Practice

Leverage a relationship-building practice and expand dialogue with key stakeholders that allows for informal interactions and strengthened network bonds.

Rationale

Establishing a central platform where ideas, feedback, and common needs can be effectively communicated will benefit TrueRoll’s growth and development, in addition to assisting in achieving its overarching strategic goals as a start-up. Through strategically utilizing an online platform, such as LinkedIn, the company can further grow its social capital and allow for word-of-mouth and organic networking opportunities to flourish (Ma et al., 2013). The flow of information from TrueRoll to customers and vice versa creates a “community of practice” where communication via a digital platform can occur informally to support the development of relationship- and network-building (Cornelissen, 2020). A community of practice is made up of three main criteria in which: participants interact based on a shared domain of a learning interest, engage with one another, and participate in creating shared content and documents (Wenger, 2011). The implementation of a community of practice is a gateway for key insights about market and environmental developments to be communicated, as well as a seamless flow of accessible, informative, and useful information (Cornelissen, 2020).

Table 11: Collaboration Plan for Communication Objective #3; Creating a Community of Practice

Collaborator(s)	Explanation
TrueRoll	TrueRoll can facilitate, guide, create, and share conversations to uphold buy-in from customers and invite additional counties to join the network. With this, TrueRoll will determine the types of conversations that will occur among the platform, whether it is about taxpayers, TrueRoll technology, etc. (Suggested point person: TrueRoll Marketing Manager)

Customers	County property appraiser offices can utilize the LinkedIn group as a central communication hub to both receive and share information regarding TrueRoll and related property tax topics as well as to actively and openly engage in conversation.
Prospective Customers	Prospective customers (future county property appraiser's offices) can utilize the LinkedIn group to become further educated and informed, in addition to having accessibility to TrueRoll's engagement and current customer engagement. Prospective customers can be influenced to become TrueRoll customers through having access to the group.

Communication Themes

- **Inclusion:** Including stakeholder groups, such as customers and prospective customers, to become an integral part of the conversation via an easily accessible digital platform builds a sense of community and the free flow of informal communication can be put into effect, to benefit the overall growth and development of TrueRoll (Cornelissen, 2020). The inclusion of TrueRoll's customers is crucial in successfully maintaining the relationship-building practice via LinkedIn in addition to furthering its engagement to those on the cusp of officially joining TrueRoll's customer base.
- **Empowerment:** The utilization of a social media platform provides stakeholder groups a voice as being part of an ongoing dialogue (Cornelissen, 2020). TrueRoll's current county property appraisers offices will feel further inclined to participate in communication and be empowered through their involvement in up-to-date industry-related discussions.

Messaging

TrueRoll should communicate to its customers and prospective customers that, through utilizing a centralized communication hub, the opportunity to share, receive, and expand their knowledge will emerge and growth will be enabled (Ma et al., 2013). The team suggests that TrueRoll's messaging takes on the role of enticing and empowering stakeholder groups to join and take part in a centralized digital platform to strengthen its identities among the community and open the door to idea-provoking conversations. The company should push towards messaging that clearly illustrates the importance of including and integrating customers and prospective customers into the community of practice, so that empowerment through engagement can be reached (Cornelissen, 2020). Moreover, TrueRoll providing its stakeholders with an organized homebase to actively engage in and learn from will benefit the company's growth and development efforts (Cornelissen, 2020; Ma et al., 2013).

The team suggests that TrueRoll's messaging focuses on the benefits of being included among the digital platform by addressing the "why" factor behind this networking initiative and its efforts. In addressing this "why" factor, TrueRoll should communicate that a simple, user-

friendly platform will allow for easy access to important shared news and ongoing learning opportunities. Beneficial learning instances will emerge through active and open dialogue between TrueRoll and its stakeholder groups that can then be taken from the group and applied to further communications for both personal growth and brand growth. By facilitating the spread of community-based dialogue throughout different counties via informative content and easy-to-follow learning and training guides, the processes of growth and development in its entirety can be streamlined and simplified (Cornelissen, 2020).

Overview of Communication Channels & Activities

The communication channel will consist of an unlisted LinkedIn group created through the TrueRoll LinkedIn company account. The LinkedIn group will contain tutorials and provide educational support on how to evaluate, analyze, and understand information and data that have been provided. Additionally, the channel will provide educational support through interactive activities, such as administering strategies on how to create a loyal and trustworthy online presence. Engagement and activity via the LinkedIn group will be enhanced through setting office hours hosted by TrueRoll, as well as through providing customer/county property appraiser success stories on a regular basis.

In establishing the LinkedIn group, TrueRoll should communicate using five different activity types: informational, promotional, educational, innovative, and storytelling.

The first activity is that TrueRoll will provide information; the company should maintain up-to-date key industry information, such as industry highlights, important updates in the market, and activities and events that the company is engaging in or attending.

The second activity is that TrueRoll should promote key wins that they experience, such as new customers coming on board (with approval from said customer). This could also include promotional content that the company experiences, such as features in magazines or features in articles and third-party social media accounts. An example of this could be, "TrueRoll was featured in XX publication, highlighting our data-science approach to identifying homeowners who are eligible for homestead tax exemptions."

The third activity is that TrueRoll should share their knowledge of state- and region-specific guidelines and resources to county property appraiser's offices among the LinkedIn group. This would help educate group members about the benefit of TrueRoll's affiliation with data science and technology.

Lastly, TrueRoll can incorporate storytelling among their communications, drawing inspiration from personal and specific success stories that customers have experienced.

Table 12: Budget for Communication Objective #3; Creating a Community of Practice

Item	Notes	Cost
LinkedIn group (unlisted)	It has been observed that TrueRoll has two LinkedIn accounts. The company should delete the inactive account so that a single, primary page can be utilized to create the unlisted LinkedIn group that will foster a community of practice. Delete: https://www.linkedin.com/company/trueroll/about/ Keep: https://www.linkedin.com/company/true-roll/	\$0
LinkedIn Premium Business account	Gain access to prospective customer leads, exclusive engagement insights, unlimited visibility on network, advanced searches, etc. These are all beneficial business insights in pursuing new customers and maximizing growth (Kapko & Florentine, 2019). \$55.99/month (first month free)	\$615/year
Engagement materials & resources	Set aside a budget for potential further engagement; hosting meetings, developing materials for LinkedIn content, webinars, tutorials, virtual/ in-person events, etc.	\$1,000 - \$2,000/year
Total estimate (yearly)		\$2,615

Table 13: Timeline for Communication Objective #3; Creating a Community of Practice

	Timing	Action Item(s)
Immediate	January 2022	Private LinkedIn group is up and running. The account has initiated inclusion of all members/necessary stakeholders.
Intermediate	End of Q1 2022	Sustained activity on TrueRoll LinkedIn page and engagement in the county property appraiser customer group.

Long-term	Ongoing	Sustained activities and engagement among the platform and biannual meetings to track progress and discuss any updates and/or changes that need to be made. Quarterly report on metrics to be utilized.
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Definition of Success

As the intent of the online community is to facilitate engagement between existing clients, prospective clients, and TrueRoll, any measure of success should look at how community relations are developing. As such, the primary definition of success will be engagement with various posts in the group. A successful group will be one that shows both high and active engagement with community postings. High engagement is the number of members engaging, and active engaging is continuing to return to the group on a consistent basis.

Measure of Success

To measure engagement, TrueRoll should invest in LinkedIn Premium Business if it does not already have a subscription, the reason being that LinkedIn Analytics are included and will provide easy-to-read metrics on engagement. There are multiple engagements to measure.

The first measurements should track ongoing engagement. TrueRoll will want members to continually engage with each other and the company through the group. Successful engagement takes two forms. The first is returning to the group. Success would mean that the group members are visiting the page weekly for updates. After a year, a successful group will have 50% of members returning weekly. TrueRoll will also want to ensure engagement occurring with individual posts made in the group. One method is to use total engagement. This is out of all their members, how many are either commenting, liking, or sharing group posts (Keyhole, 2020). For the group to be a success, end-of-the-year engagement rates on posts made in the group a strong metric should be above 5%. A good engagement rate would be 3% to 4%. A bad engagement rate would be less than 2%. Lastly, TrueRoll can measure time spent on the group page to see whether the group is succeeding as a social platform that countries use to engage one another. The strong metric would be reaching 30 minutes of weekly engagement on average. A good metric would be 10 to 29 minutes per week. An unsuccessful would be less than 10. These measures will be important because it shows that people are actively engaging with one another and that the types of post being made are what customers want.

The second measure of engagement focuses on membership. There is an expectation that the group page sees continued growth over the first year as current customers invite new customers and prospective customers to the group. The metric to look at is total membership. After one year, total membership should increase at least 50% from what it was the first month of operation. That would equate to successful implementation. A good metric would be a 25% to 49% increase. An unsuccessful implementation would be categorized as less than 25% increase in membership. One way to tell a brand's overall position and health in a market is their total share of the audience (Henman & Burberry, 2018). There are a finite number of counties in the United States to pursue. Thus, TrueRoll can continue to monitor their membership to determine

what percentage of the market they're engaging with. For a successful implementation, TrueRoll should hope to have more than 5% of the market by the end of the first year. A good metric in this scenario would be 3% to 4%, and bad would be less than 3% of the market.

Table 14: Total Budget Breakdown

Communication Objective #1: Defining Internal Team Structure	
	Part-time human resources staff member or intern: \$15,000 SurveyMonkey subscription service: \$300
Communication Objective #2: Public Education Campaign	
	Social Media Director: \$76,056 Website redesign: \$10,000 Creative software: \$590 Social media team: \$31,200 Multimedia resources: \$20,000
Communication Objective #3: Creating a Community of Practice	
	LinkedIn Premium Business account: \$615 Engagement materials and resources: \$2,000
Yearly Communication Strategy Budget Estimate \$155,761	

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Appendix A: Primary Data Collection Instruments

Appendix A1: Taxpayer Survey

Hello, thank you for taking the time to participate in this 5 to 10 minute survey!

This survey was created by graduate students at the University of Southern California as part of our project to create a strategic plan. The project will focus on supporting a company in the property tax industry. As researchers we hope to learn more about what taxpayers know, think of, and are concerned with in regards to property taxes.

All answers will remain anonymous.

Q1 Are you a homeowner?

No

Yes

Q2 Do you live in one of the following states?

Florida, Illinois, Texas, Georgia, Washington, Indiana, South Carolina

No

Yes

Q3 What state do you live in?

Florida

Illinois

Texas

Georgia

Washington

Indiana

South Carolina

Q4 What county do you live in?

Q5 If you know the name of your elected County Assessor, please state here.

The following series of questions will determine your knowledge about Homestead Tax Exemptions.

Q6 Have you heard of a Homestead Tax Exemption?

No

Yes

Q7 Do you understand the requirements for a Homestead Exemption?

Not knowledgeable at all

Slightly knowledgeable

Moderately knowledgeable

Very knowledgeable

Extremely knowledgeable

Q8 Do you receive a Homestead Exemption?

No

Yes

Q9 Have you ever had to pay property tax penalties?

No

Yes

The following section will focus on your opinion regarding government and property taxes.

Q10 Please state how much you agree or disagree with the following statements

	Strongly disagree	Somewhat disagree	Neither agree nor disagree	Somewhat agree	Strongly agree
The government maintains accurate taxpayer records	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The government taxes fairly	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The government has the technology to accurately track taxpayer information	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The government uses technology effectively when assessing tax records	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Government tax reform is needed	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q11 Please state how much you agree or disagree with the following statements

	Strongly disagree	Somewhat disagree	Neither agree nor disagree	Somewhat agree	Strongly agree
I am familiar with role of the county property appraiser	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I am familiar with the methods the government uses to maintain their tax records	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I believe it is important for the government to use technology to maintain accurate tax records	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I believe technology should be used to improve tax equity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I am familiar with relationship between taxes and state revenue	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q12 Would you be interested in learning more about how governments maintain tax records?

No

Yes

Q13 How interested are you in property tax reform?

Not interested at all

Slightly interested

Moderately interested

Very interested

Extremely interested

Q14 What do you feel are the greatest issues regarding property tax?

Q15 When voting for county appraisers, what factor do you consider most?

Political Party

Tax Policies

Personality

Previous Occupation

Other

Please answer the following demographic questions.

Q16 Please state your gender

Male

- Female
- Non-binary / third gender
- Prefer not to say

Q17 Please state your age

- 18 - 24
- 25 - 34
- 35 - 44
- 45 - 54
- 55 - 64
- 65 or older

Q18 Please state your household size including yourself

- 1 person
- 2 people
- 3 - 4 people
- 5 or more people

Q19 What is the highest level of education you have achieved?

- Less than high school

- High school graduate
- Some college
- 2 year degree
- 4 year degree
- Professional degree
- Doctorate

The code you need to enter on the HIT to receive your payment is...

FINAL5

Thank you for your participation!

Appendix A2: TrueRoll Employee Interview Guide

Hi XXX. This is XXX from USC, how are you today? Is now still a good time to talk?

As you know, for our strategic communications class, my team and I have been tasked with developing a strategic communications plan for an organization (TrueRoll).

From you, we'd like to hear more about the vision of TrueRoll from your perspective, as well as any opportunities and gaps you can identify within the existing structure that may aid or impede awareness and differentiation of TrueRoll.

For the purpose of this interview, all data sources will be kept anonymous so your name will not be utilized nor any identifiers.

We have some questions prepared and we can start with those if that works for you. Do you have any questions before we begin?

1. Perception:
 - a. What is TrueRoll?
 - b. Can you summarize your role in the company?
 - i. How does your role impact external communication with customers
 - c. Can you describe the company culture?

- d. In your own words, can you describe your perception of TrueRoll's positioning within the market?
2. Awareness:
 - a. What are the company's (internal) communication strategies for raising awareness of TrueRoll?
 - i. How have they been effective?
 1. What channels have been most effective?
 - a. Are there any channels you feel should be explored?
 2. What messages are most effective? (data, success stories, etc.)
 - ii. What strategies have been ineffective?
 1. Do you see any ways the communication strategies could be improved?
 2. What factors have played into strategy effectiveness/ineffectiveness?
3. Differentiation
 - a. How is TrueRoll different from the competitors operating in the market?
 - b. Do you think that your team's structure sets you apart from competitors?
 - i. How? In terms of how you operate, the team size, how you can communicate, etc.
 - c. How do you think your communications could improve to aid in how you differentiate yourselves from competitors?

Appendix A3: TrueRoll Client Interview Guide

Hi XXX. This is XXX from USC, how are you today? Is now still a good time to talk?

As you know, for our strategic communications class, my team and I have been tasked with developing a strategic communications plan for an organization (TrueRoll).

From you, we'd like to hear about factors that could prevent customers from transitioning to TrueRoll's product, what benefits of its product are most appealing, and your motivations for being a TrueRoll customer.

For the purpose of this interview, all data sources will be kept anonymous so your name will not be utilized nor any identifiers.

We have some questions prepared and we can start with those if that works for you. Do you have any questions before we begin?

1. Can you summarize your role as a county property appraiser?
2. Can you describe how your role as it relates to homestead audits?
 - a. How much of your role involves work surrounding homestead audits?
3. Are homestead exemptions something your constituents have interest/concerns with?
 - a. How often do you have concerns about homestead exemptions

4. How long have you been a TrueRoll customer?
5. When and how did you first hear about TrueRoll?
 - a. How effective did you think your first interaction was with TrueRoll?
 - b. What could TrueRoll do to make a stronger initial impact?
 - i. To promote awareness
 - ii. To promote differentiation
6. What convinced you to become a TrueRoll customer?
 - a. What aspect of their marketing was most effective to you?
 - b. What information would you add to the marketing?
 - i. What information would you take away?
7. How does communication with TrueRoll differ from your prior experiences with auditors/data agencies?
8. In your opinion, what is the most important aspect of your relationship with TrueRoll
9. In your own words, can you describe your perception of TrueRoll's positioning within the market?
10. As a government agency, what are the primary modes/channels of communication in which you learn about new products and services?
11. Would you recommend TrueRoll to other appraisers? Why?
 - a. How?