



RI DEPARTMENT OF STATE VIRTUAL OFFICE HOURS

Secretary of State Gregg M. Amore

I. COVER PAGE

Nominating Secretary of State:

Rhode Island Secretary of State Gregg M. Amore

Project Lead:

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Project Title:

Virtual Office Hours

Project Description:

An innovative customer engagement experience to provide clear, predictable, and thorough customer service to corporate filers, particularly those who have not engaged the services of a qualified professional. Virtual Office Hours offers customers the opportunity to meet virtually with a member of the Business Services Division team to resolve particularly challenging questions or issues.

General Subject Area:

Business Services

II. EXECUTIVE SUMMARY

1. History

As is the case in many jurisdictions, Rhode Island has seen a marked change in the typical corporate filer. While many business owners still rely on professionals – whether attorneys, accountants, or service companies – to register and maintain their entities, many opt to perform these tasks themselves. Naturally, without professional guidance, these “DIY” filers require more hands-on assistance to better understand the registration and maintenance process and requirements. At the same time, the average customer’s expectations for the type of assistance they can expect to receive through a registry has evolved. As a ministerial business registry, our office is not qualified to offer legal or financial advice, a fact we make very clear in our effort to explain key concepts to customers; however, we have endeavored to provide plain language explanations and clear, useful resources that demystify what can sometimes be a complicated process.

This shift was amplified by the COVID-19 pandemic, which brought with it a dramatic increase in three interconnected things:

- new entity registration, which has risen by 44%¹
- willingness on the part of business owners to navigate the registration process on their own; and
- appetite for virtual engagements.

The Business Services Division also administers the Business Information Center, through which customers can access interactive workshops, step-by-step guides, and information about state and municipal licensing and regulation. The Business Information Center works closely with business support organizations throughout the state and frequently fields referrals from those organizations. As the Business Services Division’s reputation for providing such hands-on assistance spread, it became evident that this service was both vital and in need of expansion, as the Business Information Center is staffed by two individuals who support all these initiatives and resources. Virtual Office Hours, which launched in November 2021, has offered an opportunity to increase the availability of such hands-on assistance without overburdening the Division’s employees and has become an indispensable part of the Division’s customer service program.

2. Significance

The goal of the Virtual Office Hours program has always been to provide an additional tool through which our customers could receive the same level of service and support they can expect to receive when calling, emailing, or visiting our office. While this new program required no changes to our standard level of customer service, it did require the Division to make several important decisions to ensure the program would be successful without overburdening our staff.

Topic Curation

In planning to launch Virtual Office Hours, we were conscious of the fact that many of our customers misunderstand the type of assistance we can provide. To better curate the kind of questions a customer may present to us during a Virtual Office Hours appointment, we chose to limit these engagements to the following topics:

¹ Comparison between new entities registered in RI in 2019 vs 2023 (9,621 vs. 13,880)

- Reinstating a revoked entity
- Dissolving or withdrawing an entity
- Starting a business
- Starting a non-profit

Staff Participation

As part of the regular course of business, all members of our team are well-equipped to handle any questions relating to reinstatement or dissolution. Answering complicated questions about starting a business or non-profit in Rhode Island have historically been functions of the office's Business Information Center and were initially handled exclusively by the two team members who administer that program. At launch, Virtual Office Hours appointments were handled by a select group of six employees with an outstanding track record for providing excellent customer service. As the program matured, additional members of the team were trained to participate.

Timing and Frequency

Virtual Office Hours appointments are available each week on Tuesday and Thursday mornings from 8:40 a.m. - 9:40 a.m. To arrive at this decision, our team carefully considered historical call and counter service volume to ensure appointments were not scheduled during otherwise busy times of the day and week.

Appointments for "Reinstatement" or "Dissolution" are scheduled for 15-minute intervals during the hour-long appointment block, allowing 4 appointments for these topics each day. Start a business and start a non-profit appointments, which often require longer conversations, are scheduled for 20-minute intervals, allowing 3 appointments each day. Overall, this amounts to a total of 28 available appointment slots per week.

In 2024, the Division expanded the Virtual Office Hours program to offer "Starting a business" appointments once a month during evening hours. The reason for this expansion is twofold. First, evening hours provide an opportunity for customers who are unavailable during normal business hours to take advantage of the hands-on assistance available through the program. Second, offering these engagements virtually in lieu of irregular, in-person meetings in response to specific referrals from our many partner organizations is a more convenient and accessible option for our team and our partners' clients.

Communication Strategy

To inform customers of this new option, the Business Services Division took several steps:

- Adding links to the appointment scheduler to our website at strategic locations, including on the main landing page and on sub-pages that relate to the appropriate appointment topics;
- Adding the recurring event to our [RI Business Services Training Calendar](#);
- Promoting the program on social media, including LinkedIn, Facebook and X (formerly Twitter);
- Notifying our partner business support organizations; and
- Encouraging direct referrals for customers calling our office in search of hands-on assistance.

Software

Finally, to launch Virtual Office Hours, the Division needed two vital pieces of software: an appointment scheduling system and a virtual meeting space.

For the appointment scheduling system, the Division contracted with ReFrame Engage. This scheduler includes several features vital to the success of this program, including:

- customizable, automated confirmation and reminder emails (and optional texts) when customers schedule an appointment;

- customizable fields at registration, which allows us to collect pertinent data from our customers such as an entity name or particular question the customer wishes to ask;
- the ability to assign appointments to members of our team, which prompts a notification email; and
- the ability to set recurring appointments and upload a holiday schedule to automate appointment availability throughout the year.

For the virtual meeting space, the Division purchased SignalWire’s Video Conferencing product. We have found that SignalWire’s virtual meeting space is ideally suited for this kind of program, notably:

- the video conferencing software is browser-based, which means neither our customers nor our staff need to download or update anything;
- the ability to create multiple “rooms,” each of which exists in perpetuity via a static URL. For the Virtual Office Hours program, the Division uses five virtual rooms:
 - Business Services Lobby (where all customers are directed to visit at their given appointment time);
 - Dissolutions;
 - Reinstatements;
 - Start a Non-Profit; and
 - Start a Business.
- the ability to set different permissions for virtual rooms and for types of users, ensuring our customers can only access the virtual lobby to which they are directed, but our staff can transfer team members and customers to all available rooms;
- a chat feature available in every room;
- the ability for our team or the customer to share their screen during an appointment; and
- the option to add a video message that automatically plays when a user enters an empty room. This ensures if a customer accesses the virtual lobby outside of their appointment time, they receive notice of how to get in touch with our team.

The Customer’s Virtual Office Hours Experience

Most customers who take advantage of Virtual Office Hours encounter the program while browsing the Division’s website. From the main landing page or a relevant subpage, the customer can easily access the appointment scheduler, choose the topic of interest to them, and then select a date and time.

Once the customer completes the required fields and schedules the appointment, they receive a confirmation email (and text, if requested at registration) with basic information about their appointment and a link to the virtual lobby.

An hour before the appointment is set to begin, the customer will receive a reminder email. That email also contains the link to the Business Services Lobby. Once the customer clicks the link, they will simply enter their name and join the virtual room. At that point, several members of our team will be waiting in the lobby to greet the customers to whom they have been assigned. The designated staff member will greet the customer and transfer them to the appropriate private room based on the appointment topic of choice. Following the appointment, the team member sends a follow-up email detailing the main points of the discussion. If the customer fails to appear for their appointment, the assigned team member sends a follow-up email inviting the customer to make another appointment or contact us via another method.

3. Impacts/Results

Since the Virtual Office Hours program was launched in November 2021, our staff has successfully hosted more than 650 virtual appointments. This number indicates the total appointments for which the customer appeared and was served. It is important to note that for Reinstatement and Dissolution appointments, the process includes sending a pre-appointment email outlining the requirements for the customer's entity to successfully reinstate or dissolve. For that reason, many of these customers cancel or fail to appear for their appointment as they have already received the answers to their questions. With this in mind, the Division has actually served nearly 1,000 customers through the Virtual Office Hours program since its inception.

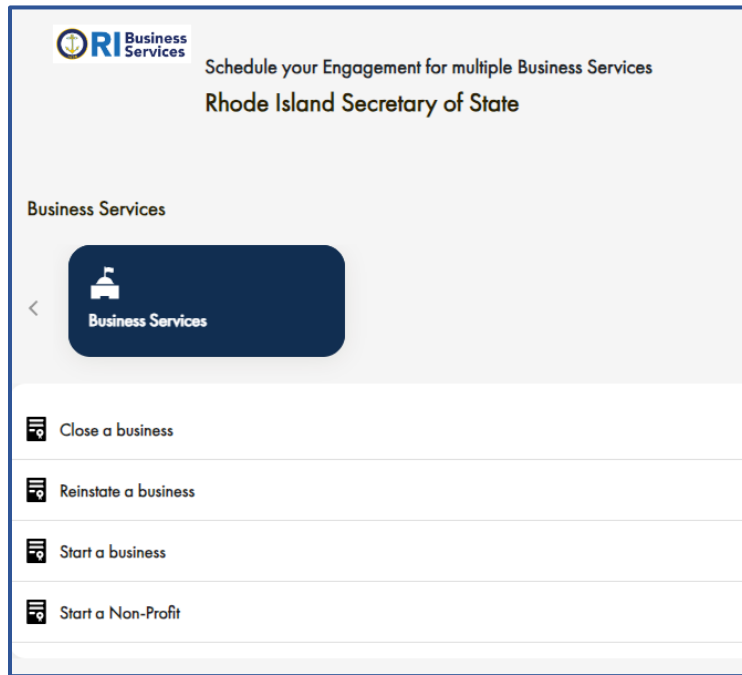
Virtual Office Hours has been met with significant enthusiasm on the part of our customers, who appreciate the attention paid to them in this one-on-one format and the convenience of a short, virtual appointment they can join from their home or office. While Rhode Island is geographically small, this program offers an accessible option to those with mobility or transportation challenges. In a larger jurisdiction, implementing a program like this would have an even more dramatic impact on accessibility of services.

An unexpected but no less important benefit of the Virtual Office Hours program has been its use as a training tool for our staff. The Business Services Division team is divided among three work groups, each of which performs a different function.² Historically, members of these work groups have been most comfortable working within the scope of six of the Division's seven programs,³ with the Business Information Center exclusively handled by two dedicated employees. Naturally, then, while every member of the team can competently handle appointments focusing on reinstating or dissolving a corporate entity, they were much less confident in providing the type of assistance required in a Start a Business or Start a Non-Profit appointment. Increasing the number of team members participating in the Virtual Office Hours program therefore allowed us the opportunity to cross-train other members of our staff on important aspects of the Business Information Center. This cross-training is likewise useful for our team when working with a customer who has called, emailed, or visited us in person, as the customer receives seamless, competent service from the Division regardless of how they choose to interact with our office or which of our programs they wish to access.

² These three work groups are: Data Entry, Document Processing, and Call Center.

³ Corporate filings, UCC, Notaries Public, Trademark/Service Mark, Apostille, One-Day Marriage Officiant Certification, and the Business Information Center.

III. SUPPORTING MATERIALS



Customer view when selecting a topic in the [appointment scheduler](#)

Appointment details
Tuesday, March 5, 2024 at 08:40 AM for Start a business

Appointment Details

First name Last name email@domain.com
First Name is required.

xxx-xxx-xxxx Opt-out to not receive text messages. Standard text message rates apply based on your carrier if opted in.

Reason Company/Business Name

Please accept your scheduled appointment

Customer view of the appointment registration screen

Schedule your Engagement for multiple Business Services
Rhode Island Secretary of State

Engagement Dashboard

Location: [Dropdown] Start Date: 2/19/2024 End Date: 2/23/2024 Refresh

You can view only one week's appointments.

VISITOR NAME	CONTACT NUMBER	DEPARTMENT	ENGAGEMENT TYPE	DATE	TIME	ASSIGNED	ACTIONS
[Redacted]	[Redacted]	Business Services	Reinstate A Business	02-22-2024	08:45 AM	Audrey Albert	[More]
[Redacted]	[Redacted]	Business Services	Start A Business	02-22-2024	08:40 AM	Gabriela Gutierrez	[More]
[Redacted]	[Redacted]	Business Services	Close A Business	02-22-2024	09:00 AM	Lauren Civitolo	[More]
[Redacted]	[Redacted]	Business Services	Start A Business	02-22-2024	09:00 AM	Gabriela Gutierrez	[More]
[Redacted]	[Redacted]	Business Services	Reinstate A Business	02-22-2024	09:15 AM	Andrea Francesca	[More]
[Redacted]	[Redacted]	Business Services	Start A Business	02-22-2024	09:20 AM	Gabriela Gutierrez	[More]

Administrator's view of appointment dashboard

BusinessServicesLobby [Invite] SignalWire | Work 00:00:19

Room Navigator

Find a room

BusinessServicesLobby
Virtual Office Lobby
1 Participant [Invite]

Dissolutions
[Room Preview] [Join] [Transfer]

Reinstatements

RI Department of State
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Leave Room

Administrator's view of the virtual Business Services Lobby with navigation to other virtual rooms