



Revenue  
Cáin agus Custaim na hÉireann  
Irish Tax and Customs

## Revenue’s Customer Engagement Strategy

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## Background

- Service for Compliance
  - Encourage voluntary compliance with tax obligations
- Decided to devise a new customer service strategy
  - Channel Management (online/telephone/paper/public offices)
  - Digital First
- Customer Engagement Strategy (CES) agreed
  - Engaging Customers to Support Compliance: 2015 - 2017
- Implementation began in early 2015
  - CES Team established to oversee implementation



## CES 2015 – 2017: Overview

- Influencing customers to use most efficient channel for their transaction
  - Online/self service is preferred channel
  - Making electronic channels the norm
  - Backed up by an excellent telephone service
- Commitment to provide alternative channels for customers unable to use digital services





## CES: Why?

- Low use of online services by employees in 2014
  - Only 32% of employees registered for online services
  - Only 37% of transactions done online that could have done
  - High levels of contacts on other channels
  - Biggest non-users: 21-30 year olds
- Rapid changes in technology
  - Online systems outdated
  - Increasing number of smart device users
- Changing expectations of customers
  - Need to provide services they want
  - Integrated services





## Initiatives to date:

- New and enhanced online services
  - Increased number of services and functionality
  - Single portal to access all services
  - Instant registration in certain cases
  - Easy retrieval of forgotten passwords
  - Accessible on all devices
  - Integrated with MyGovID
- New redesigned website
  - Based on customer needs
- RevApp



## Challenges: making ‘e’ the norm

- Provide services customers want and need
- Raise awareness and benefits of services
- Change mind sets
  - Getting customers to use the services
  - Changing the way staff work
- Non e-enabled customers
  - Digital First not Digital Only



Challenges: making ‘e’ the norm

Diversity of casebase



**42%**  
of Irish adults struggle to use technology to solve problems & accomplish task (OECD, 2012)



**2 in 3**  
consumers now own a smartphone (IPSOS MRBI)



**18%**  
of Irish adults have difficulty understanding basic written text (OECD, 2012)



- User expectations
- Instantaneous password retrieval
- Ease of journey



Challenges: making ‘e’ the norm

Getting the design right

*“...usability really just means making sure that something works well: that a person of average (or even below average) ability and experience can use the thing - whether it's a Web site, a fighter jet, or a revolving door - for its intended purpose without getting hopelessly frustrated.” (Krug, 2000)*



Making it work!

User Experience (UX)

- Understand users’ needs, abilities, goals and limitations
- Design flow
- Making it as easy as possible
- Design for mobile
- myaccount Customer Personas



Making it work!

Jobs and Pensions Customer Personas



Making it work!

Use staff knowledge, expertise and experience

Customer Panels

- PAYE: Sligo and Waterford
- Business: Limerick and Dublin
- Involved at various stages of development



Transition year students

- Road tested our new Jobs and Pensions service

Focus group of representatives from certain customers groups

- Strategy for non e-enabled customers



Change Management: Customers

Tailored for the target audience

- Targeted communications
- Outreach events
- Marketing campaigns
- Media
- Website
- Front-line staff



Need to communicate changes

- Plain ordinary language
- Will not generate unnecessary contacts

Engagement with various representative bodies



Change Management: Staff

- **Management ‘buy-in’**
  - Leadership is critical
- **Continuous engagement with staff**
  - Face to face communication is essential
  - Need to understand why we are doing it
  - Address any concerns/fears
  - Need to feedback results of initiatives
- **Involve staff**
  - Recognise and value their experience
  - ‘Outsourced’ projects to them
  - Use different Districts for pilots



Change Management

- **Skill up on new systems/initiatives is essential**
  - Complete change management, communications and training plan in place early
  - Plan devised with CES Advocates
  - Early engagement with staff on changes
  - Training delivered in advance of go-live
  - Review each plan after go-live to see what changes are needed

Lessons Learnt

- **Design is critical**
  - Involve your staff and customers
  - Use UX
- **Change Management must be integrated as part of the Project**
  - Plan early and keep reviewing
  - You need to be challenged
- **Never cut corners on change management**
  - Don't underestimate the resources and time
  - Reputational impact
- **Staff are key**
  - if you don't get them on board your project will fail
- **You can't please everyone**



Some Results: Channel Shift

myAccount Registrations ↑62%

End of Year Statements (P21) Issued:

	2014	2015	2016	H1 2017
Issued	1.1m	1.15m	1.25m	920k
% Online	31	37	53	65

