

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**



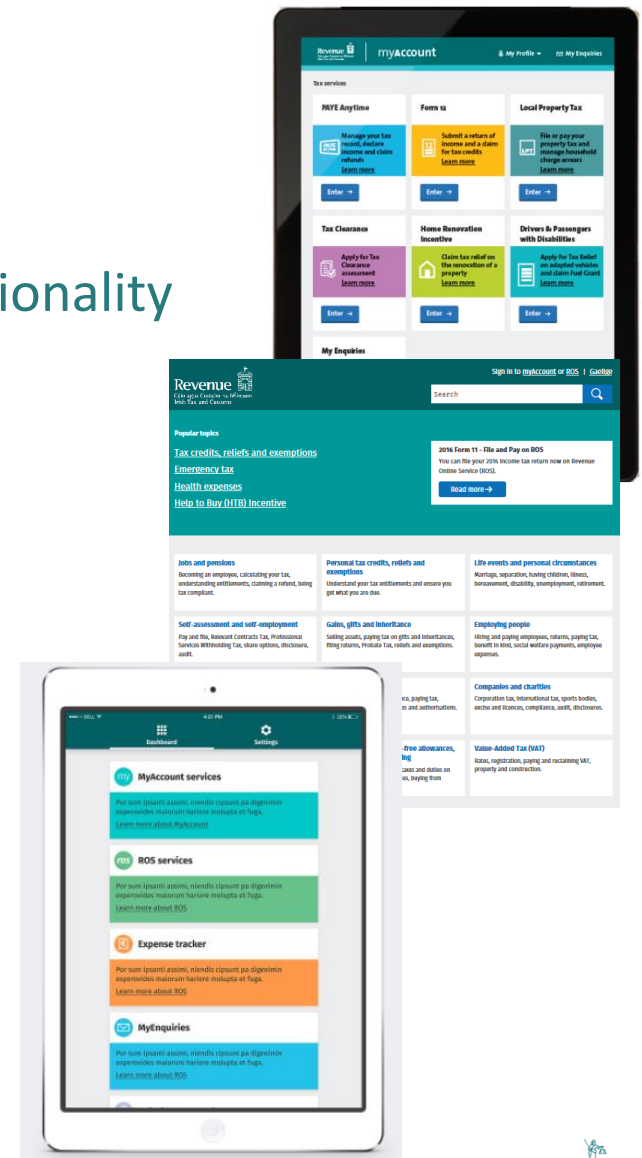
CES: Why?

- **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 - Online systems outdated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



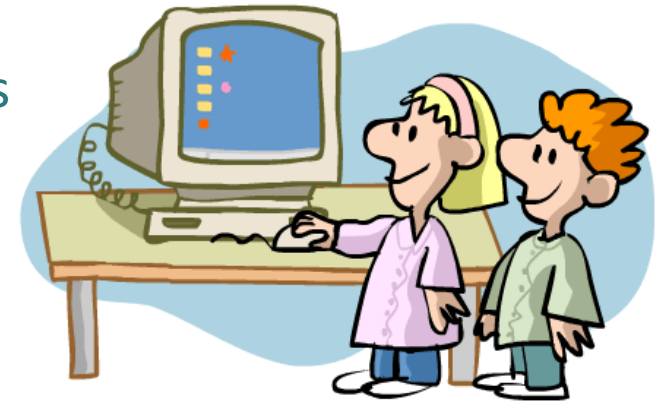
Initiatives to date:

- **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 customer 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**

Dear **past**
thank you for
all the lessons.
Dear **future**,
I'm now ready

sojournquartes.blogspot.com

Some Results: Channel Shift

my**Account**

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

