



R3 Customer-centric development practices

TEWC Briefing Pack

June 2019

Purpose of this paper

- In the R3 release significant change was driven into both myIR and www.ird. Where applicable, **customer-centric design practices** were used in the development of both these channels in order to ensure that change was aligned with customer requirements and delivered on target customer outcomes.
- This paper gives an **overview** of the customer engagement and customer-centric practices used with particular focus on the design and testing of myIR and www.ird. It is intended to **inform the TEWC** of the scope of this work, the approach used in R3 and the benefits of the work done in this respect. For myIR there is also a description of how these practices will be modified and improved in R4.
- Please note that extensive customer engagement and customer-facing testing is also used in the development of IR's gateway and integration services. These are not covered in this brief.

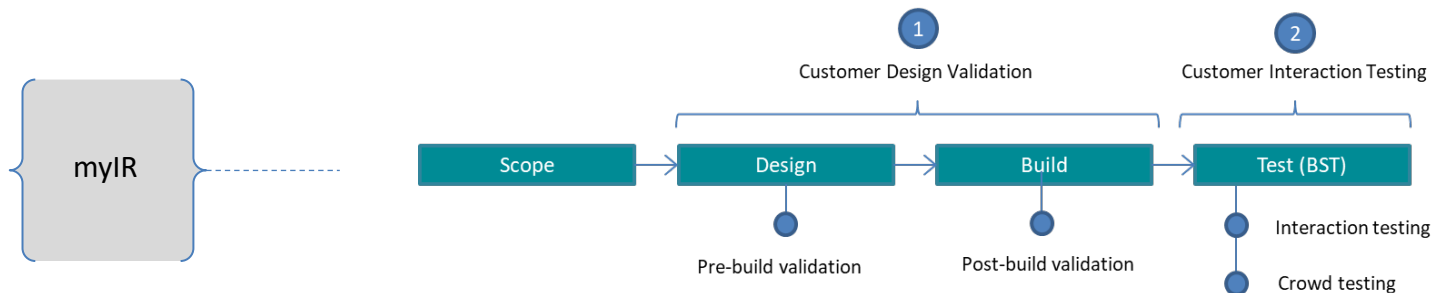
Contents of the briefing

- There are two sections in this paper:
 1. Customer-centric design and testing practices in myIR
 2. Customer-centric design and testing practices in www.ird

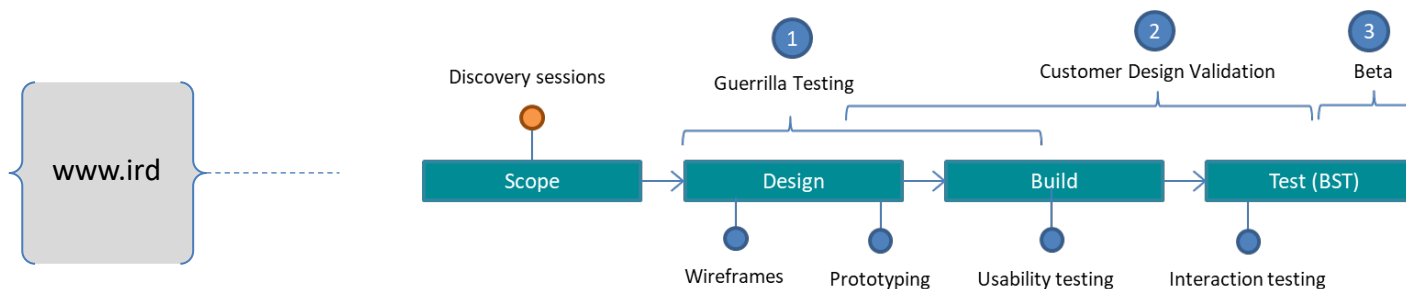
Customer engagement in development and testing of myIR and www.ird

The **purpose** of customer engagement in the design and testing of myIR and www.ird is to ensure that the solutions meets **customers' needs** and support **positive customer outcomes**. For Release 3 a variety of practices were used across the development lifecycles of both these solutions.

For myIR the R3 approach is an evolution of previous testing practice based on lessons learned from R1 and R2. **Customer Design Validation** (CDV) has been used as a vehicle for gathering customer feedback on both design and as-built solutions in their formative stages. **Customer Interaction Testing** (CIT) is run in parallel with BST and allows real customers to engage with the as-built solution with their own personal converted data set. CIT gives customers online access to the new solution and their own data from locations of their choice.



For www.ird the customer-centric design approach uses low-fidelity **guerilla testing** to confirm key aspects of the design and interaction model. This is followed by more rigorous use of **working prototypes**, **usability testing** and **interaction testing** in order to validate the design. The final step in the approach is the use of **Beta** launches to gather customer feedback at scale prior to go-live.





600+ Recommendations

Layout, flow, messaging, terminology, iconography, consistency, calls to action, task completion, confirmation, clarifications and help texts

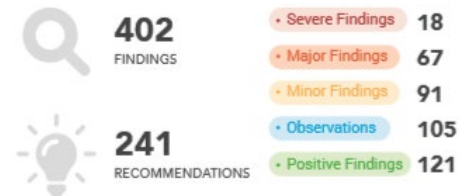


Solution improvements

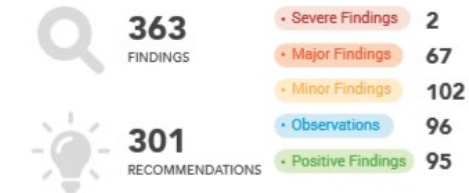
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Design Library enhancements

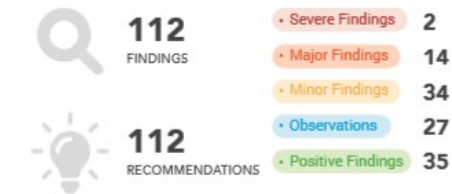
Individuals (92)



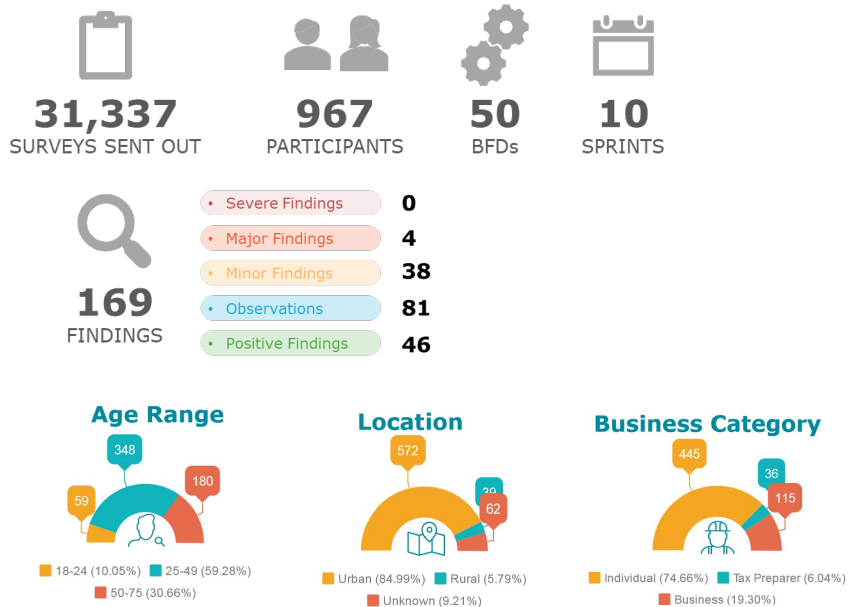
Non-individuals (72)



Tax preparers (28)



myIR → Customer Interaction Testing (CIT)



What has been done

For selected scope items we prepared a test environment using **customers' data** and formulated a series of **real world tests** for them to complete without assistance.

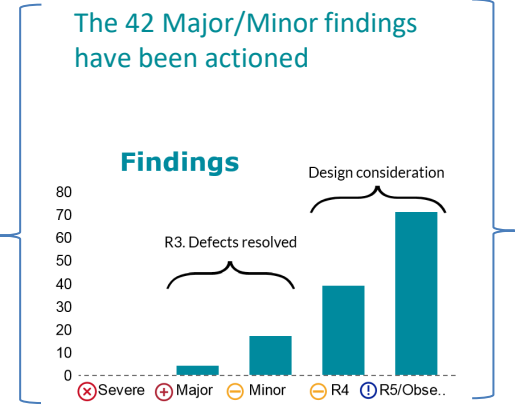
Candidate customers are selected using historical usage data and relevant customer attributes. Surveys are sent to candidate customers offering them the chance to participate. If they agree and enrol they can log-into myIR and access a **pre-release version of myIR** with their own **converted data set**. The online surveys used to gather feedback are completed once customers have attempted to solve the tasks assigned to them.

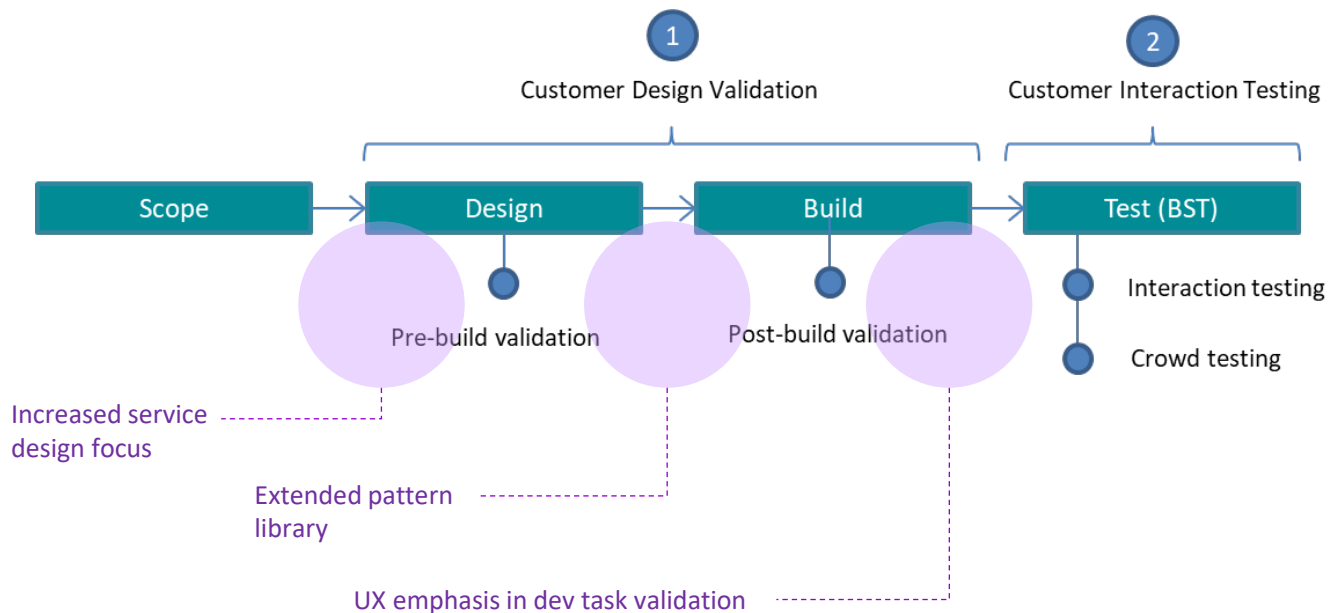
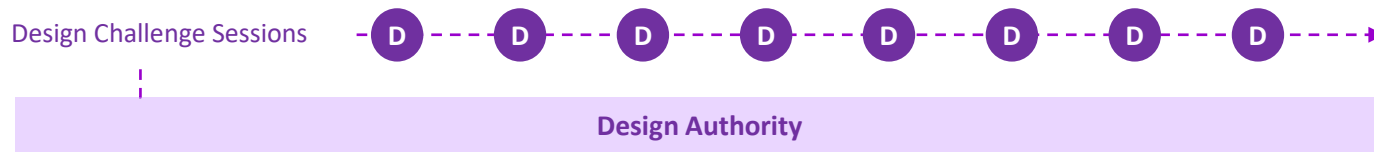
Overall, CIT showed the final build performing significantly better than when tested with customers during Customer Design Validation. CIT has provided a completely different perspective to facilitated customer testing, in general providing constructive feedback and/or helpful observations for future consideration.

Testing at scale has also revealed significant enhancements that were previously undetected by small scale and/or structured testing.

Scope of testing

- Authenticated Registration, Single account registration
- IIT - Attachments - CFC/FIF – Disclosure
- IIT - Attachments - CFC/FIF - Prior years - REB Income Profile
- Intermediary registration
- Logon maintenance
- NIT - R&D - BEPS – Imputation
- NSP XIAMS
- Online Reports (IRD number, agency reports) Payments
- Shell accounts
- Single account registration
- Tax pooling account - Provisional tax
- Tax Preparer Services - Business management
- Tax Preparer Services - Client management
- Withholding updates Certs and Returns
- Disbursements
- EDSR / EASI / eAlerts / eDocs
- FAM - Calculations – Adjustments
- IIT - Attachments - CFC/FIF - Prior years - REB Income Profile
- NIT R&D BEPS Imputation
- Tax Preparer Services - Temporary workspace
- Tax Preparer Services - Letters functionality update
- Unauthenticated registration
- Custom landing page
- IIT - 2019 forward - Prepopulated (calculated) accounts
- IIT (Both) - Special tax code (tailored tax rates)
- NSP XIAMS - Conversion and Alignment of XIAMS and eService users





Customer engagement in development and testing of www.ird

Content on www.ird has to be **simple, clear and easily understandable** and must have a clear-evidence based need. External engagement with customers to understand their needs that we have to solve for is mirrored by internal engagement models ensuring we have the required coverage of content areas.

The **design intent** is that content is presented to provide a consistent and seamless customer experience, across any device, applying a common style and voice. A non-hierarchical relationship between content offers flexibility to how that content is presented – situation, task, role or topic. Navigational support is intended to direct customers to core areas that step them through their task or explains the topic.

Customer engagement is critical **throughout the development process** in order to work out what content is needed and how it should best be formulated and structured to meet the design intent. In the discovery phase primary research is used to feed discovery session aimed at understanding customer's needs and IR's requirements to inform. Customers are used to validate the **situations, tasks, topics and roles** that the content is tailored to support.

Selected aspects of the design are validated using **guerrilla testing** which provides rapid feedback on functional features using low-fidelity prototypes. **Wireframes and working prototypes** are used to catalyse the design and these too are tested with customers in order to get feedback on whether or not the solution is capable of satisfying their needs. Finally **beta sites** themselves give an opportunity of testing production ready design and content with customers.

