Transforming

Income Tax Self Assessment Submissions:

Empowering 12 million users with an intuitive interface for exceptional customer satisfaction

When a large government department needed to revolutionise its Income Tax Self Assessment Submissions (ITSAS) by making them more accessible, intuitive and time efficient – it turned to Mercator Digital to transform the user experience.

Who:

A large central government department

What:

A focus on UCD to overhaul the Income Tax Self Assessment Submissions process

Why:

To optimise operational efficiencies and improve user experience

Benefits:

Enhanced customer satisfaction by simplifying and streamlining processes, and making services more accessible

Background:

Our client processes more than 12 million individual self-assessment tax returns each year – which relies on people understanding their own financial situation, the tax system and its requirements.

In September 2021, new regulations were introduced requiring self-employed individuals to submit all future self-assessment tax returns via third-party software (such as Xero, QuickBooks and Sage) and to keep accurate digital records from April 2024 onwards. This Act also set a condition that any self-employed individual with a revenue income of more than £50,000 would have to submit their tax return quarterly, instead of annually. These new requirements would be a key driver in modernising our client's approach to annual Self Assessment submissions.

The business case

As well as being compliant, the client wanted to:

• Enhance the public's experience by simplifying online Self Assessment submissions, expediting the process, and minimising the potential for errors.

• Improve the efficiency of its data management – with accurate real-time data.

• Reduce the administrative burden on its staff, allowing them to focus on more complex tax-related tasks, and ultimately provide a better customer service to the public.

• Empowering the public to better understand the tax rules surrounding Self Assessment – by making the content simpler and more user-friendly.

Assembling the right team for project success:

On inspection of the incumbent project, it became evident that prioritising user needs would be crucial for ensuring compliance. To help achieve this, we restructured the team to improve the balance between user-centred design (UCD) and technical teams.

Overcoming vendor challenges:

We discovered challenges within the user journey from the software vendor applications into the client's interface. To alleviate this, we upheld a culture of transparency and open communication with all vendors, proactively informing them of the client's intentions throughout the project. This provided a seamless integration and fostered strong and collaborative relationships with the software providers.

Providing strategic guidance:

We recognised a widespread lack of understanding among end customers, regarding tax and its interpretation. As a result, Mercator Digital proposed a Strategic Guidance Review. This proactive initiative was adopted and implemented by the client - with the objective to ensure that the information communicated to users is accurate, reliable, and aligned with up-to-date regulations.

Embracing opportunities:

Self Assessment had remained unchanged for nearly 20 years – presenting significant potential for transformation. The team eagerly seized every available opportunity to simplify and improve processes (through agile retrospective sessions) benefitting both end users and clients.

Benefits:

- Taking an evidence-based approach, we used data analysis and a thorough understanding of the business objectives and digital aspirations – to guarantee a successful implementation.

- We implemented how UCD should be approached in the development lifecycle. Our team successfully guided the client in adopting this methodology, and it is now included in their Requirement Gathering stage.

- The new ITSAS journey will enable the client to offer a significantly improved customer experience by:
    - Reducing the complexity of the online forms through: pre-population, auto-calculation and help text functionalities.

    - Reducing the completion time of the online forms through quicker access to accurate information.

    - Increasing the understanding of tax requirements and processes.

"The work produced by Mercator Digital has been excellent. The ceremonies and forums have been nothing but amazing. The Show and Tell is exceptional and a fantastic way to demonstrate the great work we have delivered. This really has been taken up a level and is to the highest standard. I also think the UR de-briefs have been amazing - very clear and concise."

Digital Service Manager