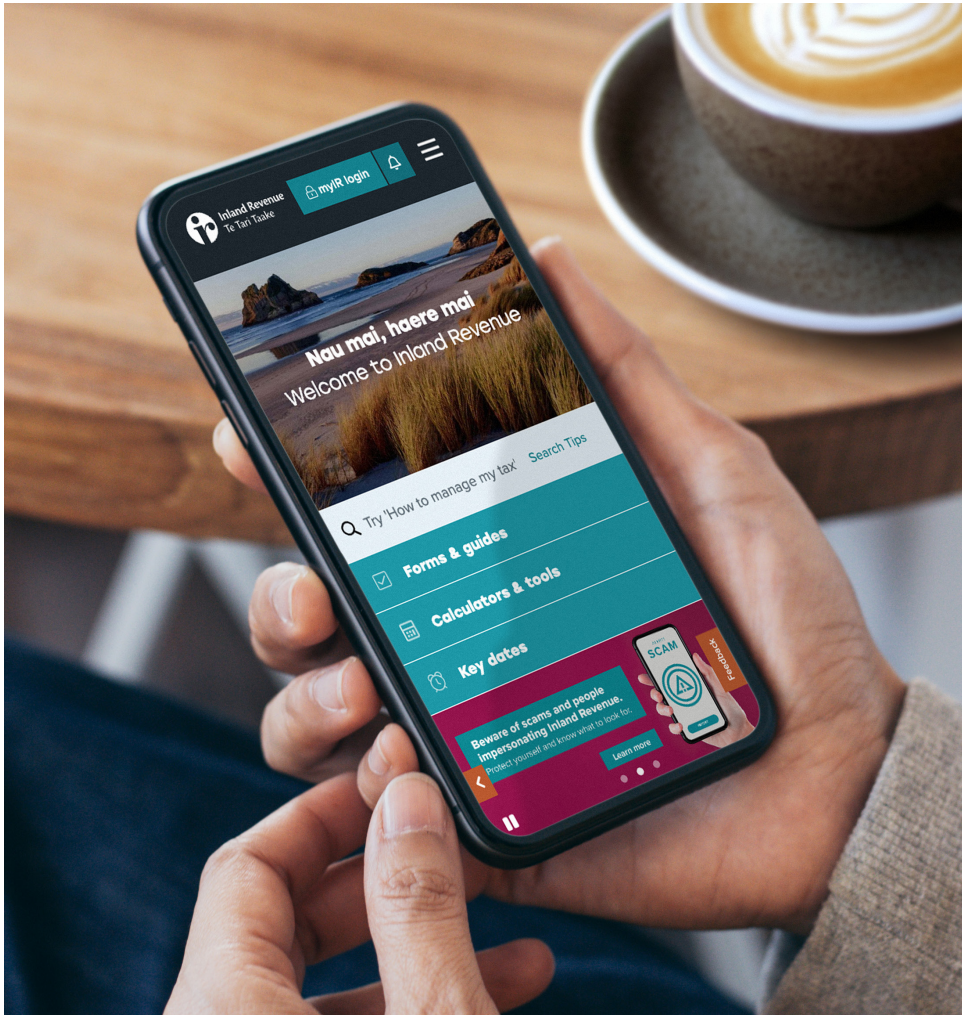


Amplifying the voice of the customer in IR's transformation with QA & Testing.



As it rolls out one of the nation's biggest-ever business transformation projects, Inland Revenue (IR) has taken extensive measures to put its customers at the centre of every digital service. With the support of Assurity Consulting, IR has introduced Customer Interaction Testing (CIT) to increase the voice of its customers in the design process to provide world-class taxation services.

Results ✨

Engaged thousands of end-users and provided detailed management information on customer interaction.

Amplified customer participation and awareness of the service outcomes.

Identified and implemented significant design changes and positioned IR for positive public feedback.



Challenge

As IR rolled out the first stage of its transformation project, it acknowledged shortcomings in the traditional IT delivery approaches, which follow a 'design, build, test, deliver' process – but with testing predominantly from a systems perspective. This can result in products that aren't fit for purpose from a customer's point of view despite meeting technical specifications.

With Assurity engaged in providing testing services across the transformation project, IR and Assurity worked together to find ways for IR's customers – tax agents, individuals, businesses, third-party software providers and more – to play a direct role in influencing systems design (and development) based on real customer testing.

"A central pillar of IR's transformation is customer-centricity, but the challenge is taking this high-level statement and finding practical ways of implementing it in a fast-moving development process," says Rogan Clarke, IR Director of Digital Change.

"The complexity for us lay in finding activities that could dovetail into these backbone development processes – iterative development is very structured, and if you want to augment it in any way, you have to do so without disrupting the established processes."

In an approach which was both radical and eminently sensible, the suggestion from Assurity was that real customers should get access to newly developed functions as they become available and be asked to perform critical actions and tasks using their own data. This would gather customers' 'real life' experiences at every iteration of development, allowing developers and technical staff to maintain constant contact with the people for whom the systems are being designed in the first place.

It's radical because it exposes customers to an as-built function as early as possible and way in advance of the entire interface being close to completion. But it's sensible because there is no better test of system design or, indeed, user experience than actual rather than simulated data.

The approach, therefore, rested on Assurity meeting IR's security standards when exposing production-like data externally.

"By designing in a certain way, we realised we could evaluate the impact of services provided to end users and shape them before finalisation," explains Clarke.

About

Organisation

Inland Revenue

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Inland Revenue (IR) plays a critical role in improving the economic and social well-being of New Zealanders, collecting 80% of Crown revenue, as well as collecting and disbursing social support programme payments and providing the government with policy advice. Since 2014, IR has embarked on a \$1.8-billion business transformation project, making it simpler and faster for New Zealanders to pay taxes and receive entitlements.

Solution

Employing a shift-left approach, Assurity developed an early Design Engagement model, strengthening the voice of the customer in the delivery process. 'Shift-left' seeks to find and prevent defects early in the software delivery process, improving quality by testing earlier in the software development process.

Assurity engaged in Agile sprints to define key functional areas to expose the IR product to the identified customer segments such as tax agents, individuals, and businesses. A security-controlled Beta environment with key objectives and user stories was created to support customer engagement.

"The model we gravitated to was CIT, which allows us to gauge progress across functional points as we developed them incrementally. The background process is highly incremental, with blobs of functionality steadily added. Involving customers directly with each point of progress is a great method to do a reality check from an 'outside in' perspective."

Getting customers involved, Clarke notes, turned out to be easier than initially imagined. "There's a genuine interest in participating. Everybody needs to deal with tax, and we found that the people we reached out to were generally very willing to play a part in getting it right," he says. Assurity gathers feedback in sprint reports on design issues, defects, observations, and customer experience.

With the CIT design from Assurity, Clarke says IR was provided with an easy mechanism for individuals to log in using existing myIR credentials. Customers were allocated a time slot and asked to sign on to the Beta environment to achieve a task goal using their own defined data. "When a customer evaluator logs in, despite any changes or updates, it feels somewhat familiar, so there's continuity in the experience."

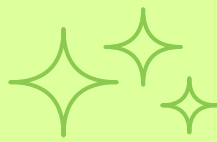
"Having the customer's feedback makes testing more relevant. It's a powerful tool that keeps us aligned with the customer's perspective of what we're doing."

Assurity gathers feedback in sprint reports on design issues, defects, observations, and customer experience. The resulting reports are issued to Executives to inform potential design changes or mitigating actions.

He describes the approach as 'a high level of pragmatic innovation'. "It's that simple – but making things simple is always our hardest challenge."



Results



Thousands of end-users were engaged through CIT, providing detailed management information on customer interaction. As a result, Assurity has helped IR identify hundreds of design improvements for resolution in advance of system testing.

A significant volume of design changes was identified and implemented, positioning IR services for positive public feedback; Clarke says customers have enthusiastically responded to early engagement, resulting in amplified participation and awareness of the service outcomes.

“CIT has proved highly effective because it combines ‘hard’ and ‘soft’ perceptions, says Clarke. This means we don’t just check on the customer’s ability to execute, but we also gauge sentiments: Does the customer feel we are facilitating their task efficiently and giving them what they need to get it done? Do they have the assurance that once completed, they have got it right?” One of the biggest concerns customers have with IR engagements is that they might make a mistake or leave something unfinished. “Some of our processes are complex, so we want customers to feel assured.”

He credits CIT with underpinning a basic philosophy of compliance at IR. “We want to make it fast, easy and convenient for customers to do their taxes. This drives up compliance, which means we don’t have to be an ambulance at the bottom of the cliff trying to restore people to compliance. Doing that is exceptionally wasteful for the individual and the tax authority.”



He adds that the development of all IR’s digital channels has mirrored the ‘shift-left’ approach, making it far easier for people to stay connected with their tax position.

“We’re going from a purely ‘transact’ engagement to ‘snack, manage and transact’, where the snack action is a quick peek just like online banking, where you log in and get a summary of your position to feel confident. We’ve gone from around 2% accessing myIR on mobile to 36% as customer behaviour has changed.”



“Customer-centricity is the ethos we live by at IR. We have a duty of care for every customer and the country itself. With CIT, we get better designs and improved long-term compliance.”

— **Rogan Clarke**
Director of Digital Change, Inland Revenue

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