



## *Research report*

# **Helping SA customers move online – support product testing**

**Testing with customers the proposed leaflet and the step by step guide.**

**Business Customer & Strategy**

## ***About Business Customer and Strategy (BC&S)***

Business Customer and Strategy is part of Business Tax.

The goal of BC&S is to maximise Business Customer compliance for HMRC at best cost for both HMRC and the customer. This is done by developing business tax strategies through customer understanding, working with teams in HMRC and across government departments.

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## ***Research requirement (background to the project)***

During 2008, HMRC issued a number of communications aimed at advising Self Assessment (SA) customers of the new deadlines for filing on paper (31 Oct 2008) and online (31 Jan 2009), and also encouraging those who could do so to switch from paper to online filing. Two key elements of the communications planned were a) a leaflet explaining the new deadlines, the advantages to customers of going online and how to sign up for HMRC Online services; and b) a step by step guide, explaining to customers switching to online exactly how to do so (in much more detail than the leaflet).

Before finalising both products, HMRC wished to test with prospective SA online customers whether:

- The products met the needs of their target audience (in terms of their general content)
- They were written clearly, in a way that non – technical readers could readily understand, without being patronising
- They were successful in encouraging paper – filing customers to convert to online filing, and providing those who needed help with the right amount of information to enable them to do so.

## ***Who did the work (research agency)***

The research was conducted by Discovery.

## ***When the research took place***

The fieldwork was conducted in March 2008.

## ***Method, Data and Tools used, Sample***

The research was based on a number of qualitative discussion groups, consisting of a mix of SA employees, the self employed and pensioners, none of whom was represented by an agent or had filed online before. The groups were mixed in gender, age and IT skills.

All participants had been sent a draft of the leaflet in advance, and asked to complete a short evaluation questionnaire. At the discussion sessions, they were asked, first of all, to go through the two key sections of the step by step guide, highlighting and annotating anything they couldn't understand, found confusing or simply felt could be better presented. They were also asked to identify instances where they felt there was too much/ too little information in the guide. They then filled in a questionnaire about the guide. The last half of the discussion session was spent in discussing their reactions and recommendations to both the leaflet and the guide.

## ***Main Findings***

Overall, both products were found to be effective and fit for purpose. The language used was welcomed for its simplicity and clarity, and the overall layout and tone were deemed to be user friendly without being patronising. Participants recognised that prospective readers would vary in their degree

of computer skills and confidence, and accepted that both products needed to be pitched more at the least confident. Overall, they judged both products to be enabling, encouraging and reassuring.

## 1. Leaflet

- Reactions towards the leaflet content were positive – participants felt that it covered in sufficient detail most of the issues relating to online filing and how to register.
- One key issue on which participants wanted more information was security – both in justifying the amount of information HMRC required of customers in order for them to register/ enrol for online services, and also how that information was then stored by HMRC. Once participants understood that such information was requested to protect their own security as they filed online (even though it might make the registration process a little laborious) and that it was securely held, they felt much more confident in going online.
- Participants also wanted the leaflet to explain more clearly one of the key benefits of the online SA return – that it is personalised to the customer's circumstances, so that questions which are irrelevant to the customer are deleted automatically. Making this clearer would also enhance the "easier/ simpler" messages elsewhere in the leaflet.
- Language and tone received very positive responses from all participants, being most frequently described as helpful, reassuring, inclusive and clear. The overall clarity rating (on a scale of 1 – 10, where 10 was "very clear") was 9.

## 2. Step by step guide

- Overall, the two sections of the guide ("Getting started" and "How to complete your tax return online") which participants went through in depth were regarded as working very well. There were no obvious omissions from the content.
- Most participants felt that the guide successfully achieved its purpose of helping them, step by step, file their return online. The overall rating (in a scale of 1 – 10, with 10 being judged as "Completely successful") was 7.
- Having gone through the Guide, all felt more confident in completing their return online, with the average confidence rating being 8 (with 10 being "Extremely confident"). There were no differences to these ratings between participants with different levels of computer proficiency or confidence.
- Language and tone were deemed to be appropriate, although some found the style a bit too informal. In some places, it was felt that the text needed to be broken up a little.
- The layout and balance of text to visuals were felt to be user – friendly, and the use of screenshots with tabbed style/ numbered text boxes was considered very easy to follow.
- Most participants liked the loose folder approach, with colour coding of the different sections of the guide, because it suited their way of working; others (who were more IT confident) preferred all the information to be integrated into one large document.