

Research report

Report on improving Personal Tax customers' experience of dealing with HMRC

Qualitative research with individual taxpayers to explore the key drivers of satisfaction and dissatisfaction with their experience of contacting HMRC through a range of channels

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About Personal Tax Customer & Strategy (PT C&S)

Personal Tax Customer & Strategy works with colleagues in Personal Tax and across HMRC to help develop our approach to implementing the customer centric business strategy. We use customer insight to help PT design, deliver and operate services for individual customers which

- improve customer experience
- maximise tax yield
- ensure that those who need help get the support they need, when they need it

PT C&S also has a corporate role, to manage the relationship with the voluntary and community sector on behalf of HMRC

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Research requirement (background to the project)

HMRC have committed to increase the proportion of call attempts handled to 90% and to respond to 80% of post within 15 working days and 95% within 40 working days by the end of SR10. Against this background of improving performance, HMRC wanted to better understand what else they could do to improve personal tax customers' perceptions of their experience of dealing with HMRC: in particular, the 3 dimensions that make up the Customer Experience headline measure, 'customers find us straightforward to deal with'. These dimensions are:

- 'ease of getting in touch'
- 'ease of understanding what to do'
- 'ease of completing the process'

The specific objectives were to:

- Understand better the drivers of satisfaction and dissatisfaction with the customer experience
- Provide examples of positive and negative experiences in dealing with HMRC
- Understand how different factors influence consumers' perceptions, and how these factors are interrelated
- Provide actionable recommendations for ways in which HMRC can improve customer experience

When the research took place

This research was commissioned in February 2012, with fieldwork conducted in March 2012 and an initial research report received in April 2012.

Who did the work (research agency)

This research was undertaken by TNS BMRB

Method, Data and Tools used, Sample

Re-contact interviews of up to 25 minutes were undertaken with 30 customers who had previously taken part in the HMRC Customer Survey and had rated their experience as neutral or negative on at least one of the three dimensions in the Survey. The sample included customers whose dealings were concerned with one of the following areas: PAYE employees, PAYE pensions, Self Assessment or tax repayments. All customers included in the discussions had had some form of contact with HMRC in the previous six months, including by telephone, post, online or in person.

The research was one of two pieces of qualitative research commissioned to explore this issue and generate actionable insights, the other being eight focus groups conducted in London, Birmingham, Glasgow and Manchester. The sample included a mix of those who were positive and negative about 2 or more aspects of their experience of dealing with HMRC

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regarding this issue. The findings from this research are published in parallel with those from this study.¹

Main Findings

Expectations of HMRC

- Respondents that rated HMRC as neutral or negative on at least one of the three customer experience dimensions tended to have a wide range of expectations of the service HMRC provides and some expected to have problems or difficulties in their dealings with HMRC.
- There are two main groups contacting HMRC: those seeking information and those disputing HMRC decisions. Those disputing HMRC decisions had lower expectations about the service they will receive.
- Positive expectations expressed by respondents related to confidence that they would be treated fairly, that issues would eventually be resolved and general positive comments about staff competencies.
- Topmost in the minds of respondents were expectations concerning the long wait times on the telephone and long response times for other modes of contact.

Getting in touch with HMRC

- The main factors that respondents took into account when rating HMRC in this category were:
 - The ease/difficulty of finding contact details for HMRC
 - The length of time they had to wait to speak to a telephone advisor
 - The ease/difficulty of using the contact modes (telephone, letter or web)
- The majority of respondents in the sample made their first contact with HMRC by telephone. This method was preferred over other modes because it was perceived to be immediate, convenient and interactive.
- There was general consensus that a reasonable wait time to get through to HMRC on the telephone would be no more than 5 minutes and that the maximum wait time would be between 10 and 20 minutes.
- Initial contact by post was less frequent in this research, and when it occurred it was usually in response to a postal communication from HMRC.
- Web contact with HMRC in this research was much less frequent and usually resulted from respondents searching the HMRC website for information and then going on to complete a web form.

¹ Improving the Customer Experience score

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- When respondents were asked what factors led them to give HMRC negative or neutral ratings on the question about getting in touch with HMRC, almost all indicated that long wait times on the telephone were the main factor that had led them to give a poor score.

Ease of understanding what to do

- The main factors that respondents took into account when rating HMRC in this category were:
 - Ease/difficulty finding information about tax online and
 - Ease/difficulty understanding communications from HMRC.
- Increasingly respondents were seeking to find information online but felt that the current HMRC web site search engine was a barrier.
- There were mixed views about the quality of correspondence from HMRC. The majority of respondents acknowledged that the quality of the correspondence was generally good, and had no particular problems or concerns with it.
- Others felt that letters from HMRC tended to be difficult to understand and used technical, legal or financial terms that were not generally known to the public.

Ease of completing the process

- The main factors that respondents took into account when rating HMRC in this category were:
 - Ease/difficulty resolving queries with helpline staff;
 - Ease/difficulty completing forms; and
 - Understanding when the process had come to an end.
- For many respondents, their dealings with staff on the helpline was the most positive part of their experience with HMRC. However, this was not always the case, and some were critical of the service they had received.
- Difficulties completing forms was a major reason for giving a negative rating. Respondents considered that parts of the forms were sometimes difficult to complete and that guidance and supporting documentation was sometimes inadequate and not always easy to locate.
- Respondents were not always sure whether the dealing had come to an end.