

ONESOURCE Tools Workshop Outcome

Dataflow, Audit Manager, R&D Tax Credit

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Overall Goal

High-level personas & pain points

Define customer journeys

Uncover opportunities based on customer pain points

Sketch and validate proposed solutions

Our Approach: During the Workshop

1. Persona Validation

2. Customer Journey Mapping

- Capture detailed steps and touch points of the process
- Identify gaps and opportunities

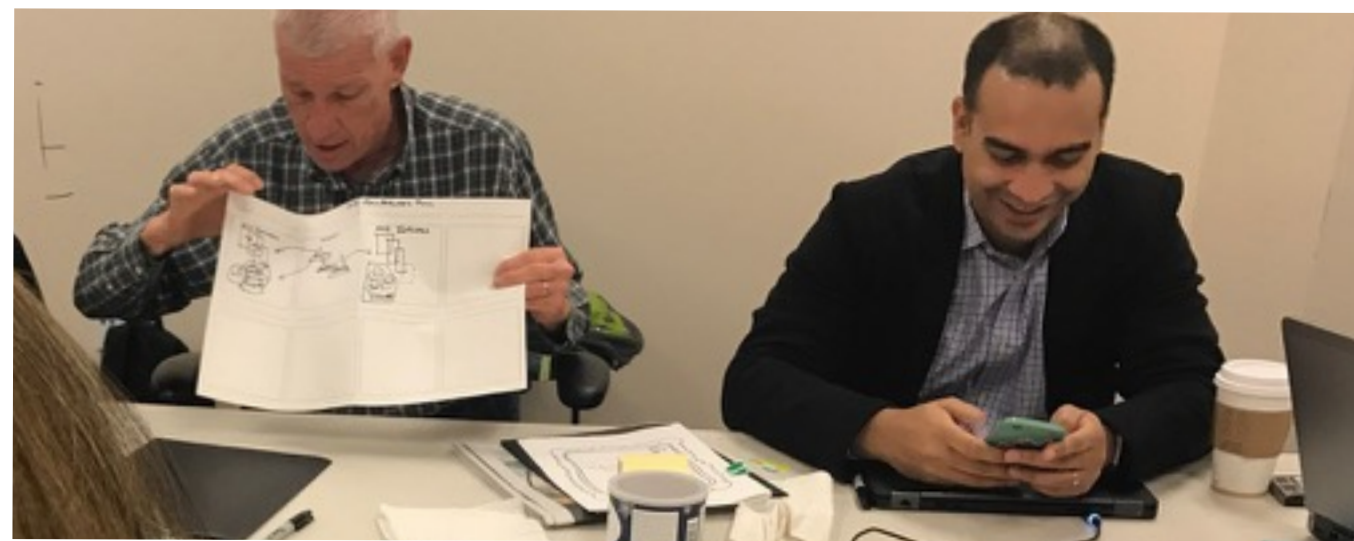
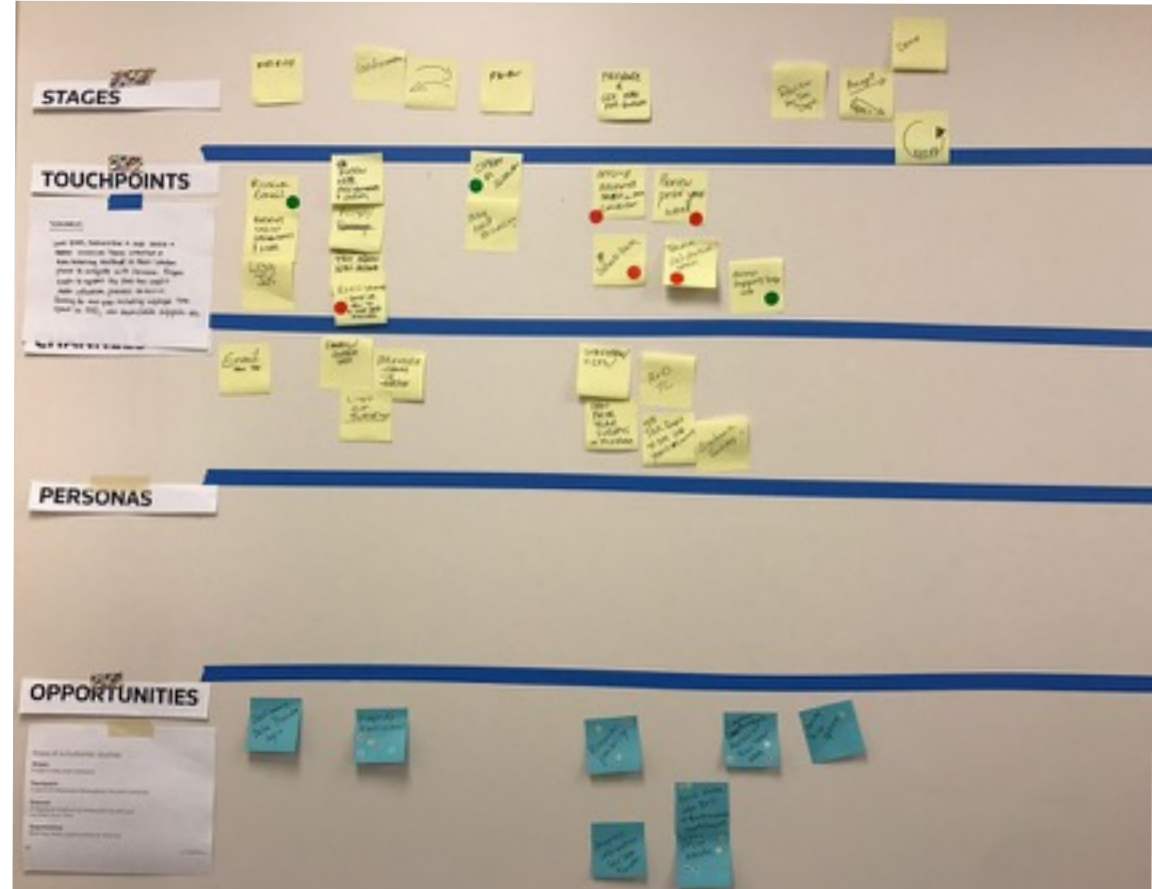
3. Identify high and low points in the process

4. Vote on biggest opportunities

- Group voting to identify the most impactful opportunities

5. Concept sketching of opportunities

- Sketch high-level concepts



R&D Tax Credit

Combines comprehensive, web-based software with professional services to identify qualifying research and development activities and help maximize your tax credit.

R&D Tax Credit Takeaways

- Data providers need easy access to surveys and a mobile (responsive) solution
- Administrators (tax analysts) are spending too much time on tracking data collection
- Possibility to use **MTI** functionality for survey
- Data providers may not be tech savvy
- Possible need for 3rd party integrations, e.g. time tracking



Melinda

Sr. Tax Manager (Administrator)
Anheuser-Busch
Dallas, TX

Melinda owns the R&D tax credit in a particular country for the MNC.

R&D Administrator Pain Points

- Cross-departmental, no working relationship/hierarchy, may not know each other
- Pulling wage data
- Calculations
- Putting data together in format needed
- Parent/Child approach has issues, e.g. load source data into system



Thomas

Sr. Tax Analyst
Anheuser-Busch
Dallas, TX

Thomas is responsible for the calculation and data collection process including surveys for this credit, working with the scientist(s).



Samantha

VP, Taste & Brew Sciences (Data Provider)
Anheuser-Busch
London, UK

Samantha is the data provider, conducting the research and providing information to the analyst for this specific tax credit.

VP/Data Provider - Pain Points

- No time to fill out surveys
- Accessibility is important
- If they need to register or use an add-in they will walk away
- May collaborate with employees to collect data
- Need to data entry, need to copy/paste
- Any obstacle will cause them to be noncompliant
- Being asked for data by someone she doesn't report to
- Reassignment of data collection
- Data e.g. time spent on projects
- May need to give staff data provider her log-in or ask Administrator (Tax Dept) to reassign



Bryan

Taste & Brew Scientist (Data Provider)
Anheuser-Busch
London, UK

Bryan is the scientist on Samantha's team and provides majority, if not all the data for the R&D Tax Credit process.

Staff/Data Provider - Pain Points

- No access to mobile solutions
- No time
- Any obstacle excuse not to provide data
- Why no rollover from last year? Prior year survey, pre-populate from last year, etc.
- Lack of integration with business services e.g. project tracking
- Inability to leverage existing data

Customer Journey Map

Scenario 1 & 2

Last year, Samantha and her Taste & Brew Sciences team created a successful brewing method in their London plant to compete with Guinness. Bryan needs to support the R&D Tax credit data collection process to receive funding for next year including employee time-spent on R&D, non-depreciable supplies and any contract resources.



Samantha - VP, Taste & Brew Sciences



Bryan - Taste & Brew Scientist

Last year, Samantha and her Taste & Brew Sciences team created a successful brewing method in their London plant to compete with Guinness. Bryan needs to support the R&D Tax credit data collection process to receive funding for next year including employee time-spent on R&D, non-depreciable supplies and any contract resources.

Persona: Samantha, Data Provider
Journey: R&D Tax Credit



LEGEND

- ONE VOTE
- ★ WINNING IDEA
- HIGH POINT
- LOWPOINT

Melinda begins the process of the collecting information for Anheuser-Busch to receive the R&D Tax Credit. She assigns majority of the data collection and calculation work to Thomas. He is responsible for the communication between the Taste & Brew Sciences group and the tax department.



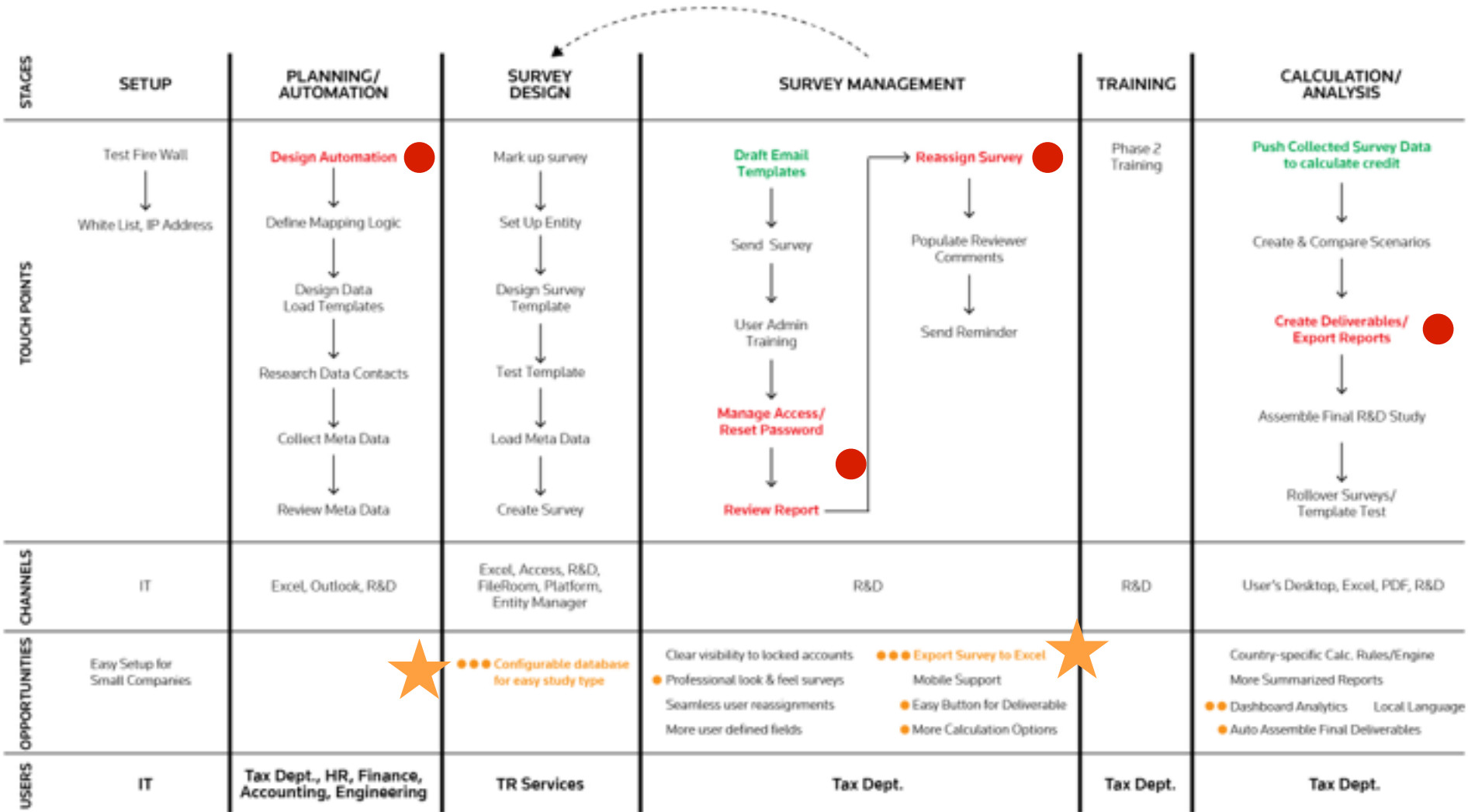
Melinda, Sr. Tax Manager



Thomas, Sr. Tax Analyst

Melinda begins the process of the collecting information for Anheuser-Busch to receive the R&D Tax Credit. She assigns majority of the data collection and calculation work to Thomas. He is responsible for the communication between the Taste & Brew Sciences group and the tax department.

Persona: Sr. Tax Manager, Administrator
 Journey: R&D Tax Credit

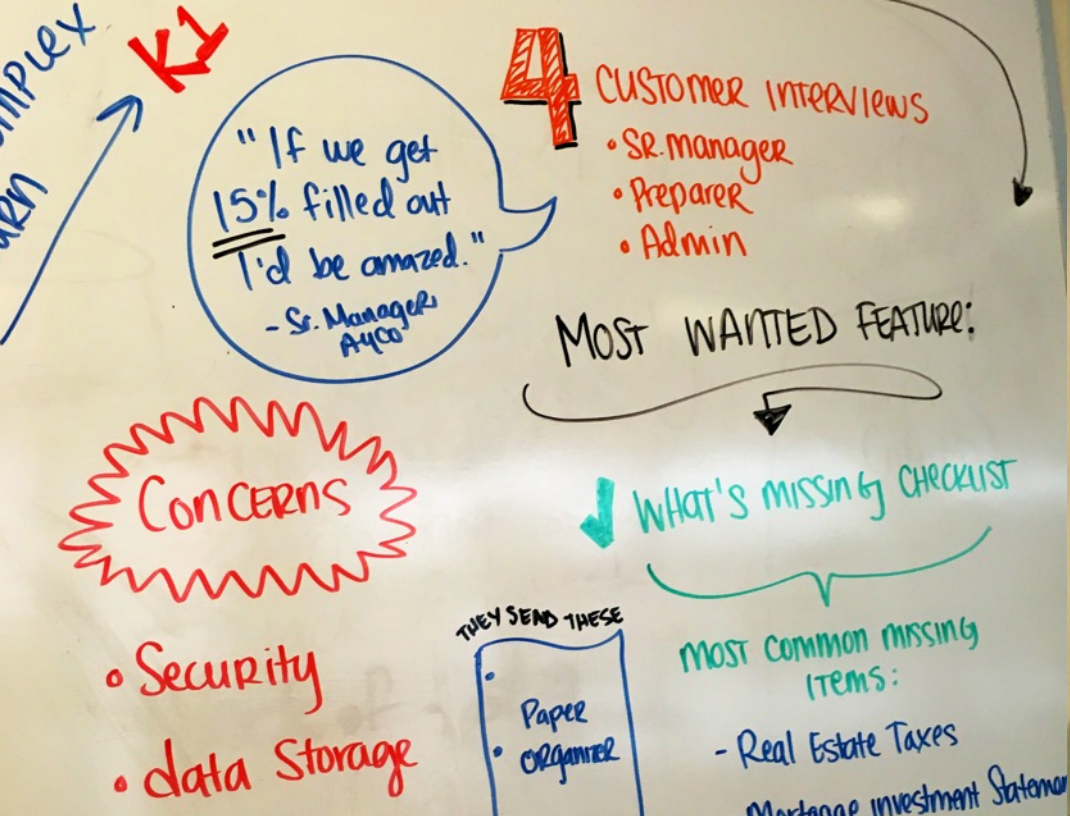


LEGEND

- ONE VOTE
- ★ WINNING IDEA
- HIGH POINT
- LOWPOINT

Next Steps

- UX Roadmap
- Stakeholder Interviews
- Customer Interviews / Observational Research
- Concept Designs



LEDO

Workshop discoveries

June 2016

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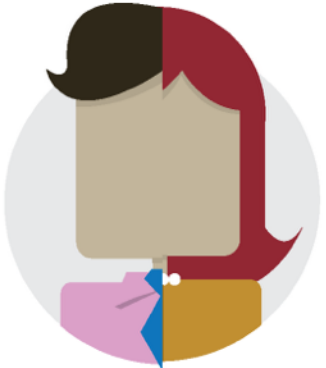
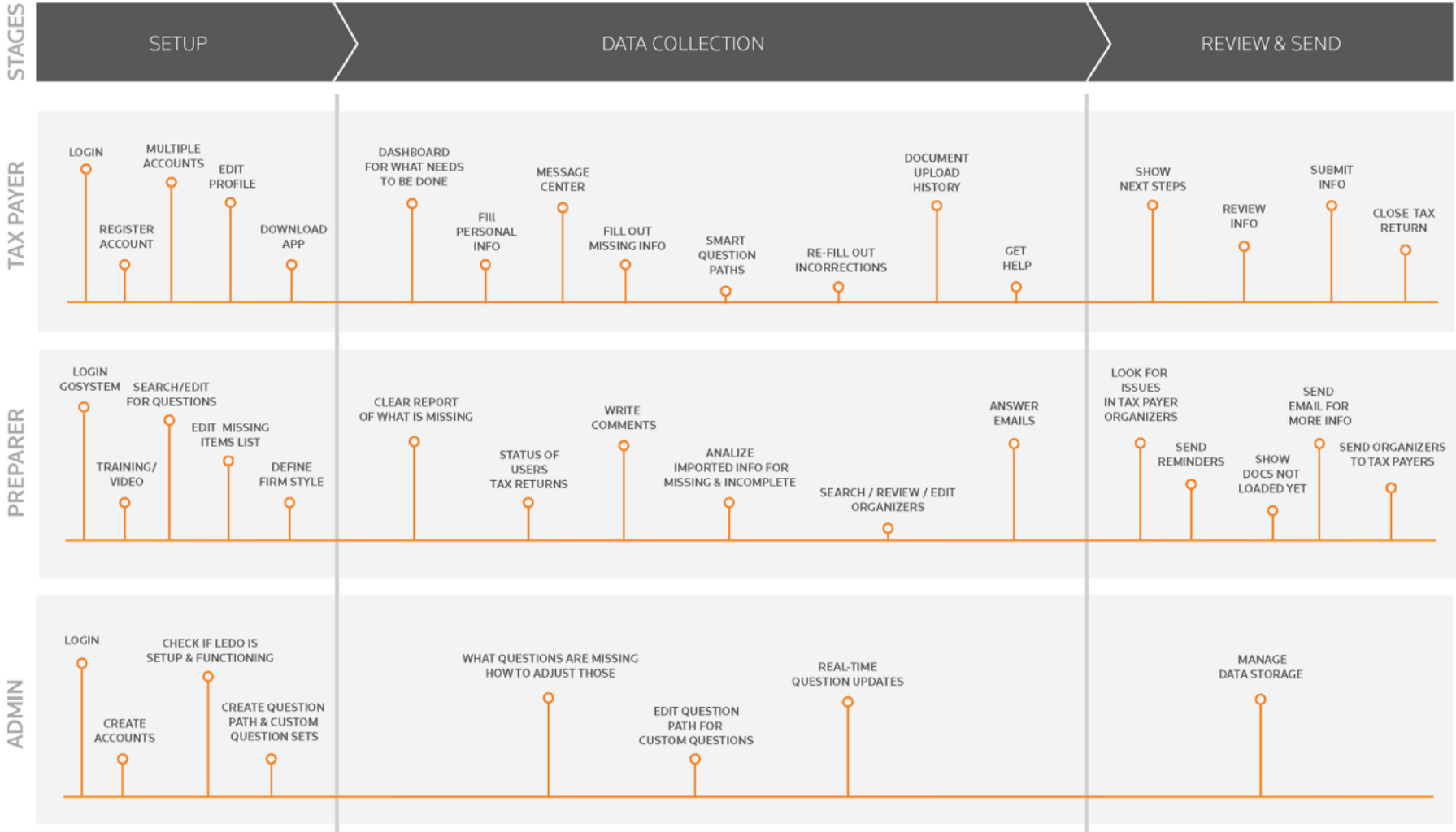
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Pain Points & Needs

- Logging In
- Shoe box Data Storage
- Security
- Manual Process
- Too Many Steps
- Error Messaging
- Notifications
- Simple, Easy to Understand Interface
- Usable on Touch Screens
- Mobile App

Solutions

- Message Center
- Easy, Straight Forward Questions & Entries
- One Place to Keep track of all returns
- Display Useful Information Up Front
- Allow User to Update Missing Items & Create Comments
- Documentation Trail
- Only Ask What is Necessary
- Put All Features in 1 App



Tax Payer
Preparer
Admin

Opportunities

- Smart Question Path
- Clear Report of what is missing
- Better Way to Communicate
- Document Center to View & Manage

Next Steps

- Tax Payer Entry Point Email & Login Experience
- Schedule-C Tax Payer Data Collection Workflow
- Tax Payer Dashboard



MYTAXINFO

User Testing Findings

Oct. - Nov. 2016 | Landon Register

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Methodology

5 Remote Sessions **45min** Avg. Length

7 In-person Interviews **20min** Avg. Length

Users were given a scenario and a series of tasks they were asked to accomplish in the prototype. Via Webex or at the Synergy Innovation lab, they were able to interact with the product and provide feedback to their experience.

Remote sessions were recorded via webex

Participants



REMOTE

Managing Tax Director
KPMG

Tax Manager
KPMG

Partner
KPMG

Principal GTI
KPMG

Engagement Manager
KPMG



SYNERGY PROFESSIONAL

Preparer & Reviewer
Private CPA Firms

Director of Firm
Private

Technology Director
Crowe Horwath

Sr. Tax Manager/Tax Manager
Medium CPA Firm

Scenario

Your company is about to start preparing taxes for 2016 and has acquired MyTaxInfo for this process. As a preparer you would like to login and start the process.

MTI / Key User Test Findings Preparer Dashboard Walkthrough

Preparer Dashboard Walkthrough

COMPLETION SUCCESS



STEP 1:
Explain % amounts
on accounts




STEP 2:
Explain what the
organizer tabs mean





STEP 3:
Explain the
meaning of the
statuses



STEP 4:
Overall feedback

 **Success**
The user
easily
completed
the step

 **Moderate Issues**
The user experienced
problems but were able
to continue

 **Critical Issues**
Users were not able
to complete the step
or required assistance
from the moderator

Step 1: Understanding % on account completion

The screenshot shows the Thomson Reuters MyTaxInfo dashboard. At the top, it says 'Good afternoon, Jane Doe'. Below that is a 'Your Returns' section with a table of returns. The table has columns for the return name, due date, status, and a progress indicator. A green circle with the number '1' highlights the 0% completion indicator for Johnny Bravo.

Return Name	Due by	Status	Completion %
Johnny Bravo	April 15th, 2015	Ready for data collection	0%
John & Mary Smith	April 15th, 2015	Missing Information	50%
Logan Howlett	April 15th, 2015	Working on organizer	30%
Donny Brasko	April 15th, 2015	Opened organizer	5%

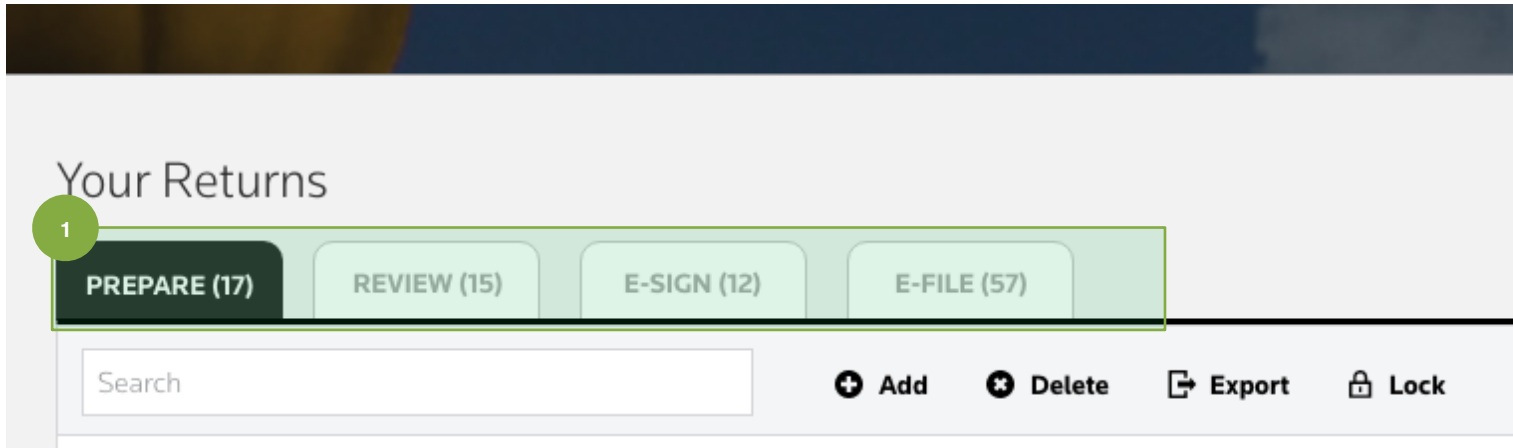
1 % on account completion

All participants were able to successfully understand it meant the % complete in the users organizer, per section.

Feedback

- “% is hard to gauge”
- “i don't understand the math, but I understand what it means!”
- “This would be great”

Step 2: Explain what the organizer tabs mean



1 Organizer Tabs

All participants successfully understood that the tabs reflected the main sections in a users return.

NOTE

KPMG partner noted that they wouldn't use the review, e-sign, or e-file tabs and continue to use their workflow.

Step 3: Focus on the statuses, what do they mean?



1 ADD RETURNS

All participants understood the statuses. They should reflect their business workflow.

User Suggested Statuses:

- Sent organizer to client
- Sent back to preparer
- Opened by preparer
- Requested missing information
- Received missing information
- Completed preparation and sent for review
- Taxpayer is reviewing
- E-file is setup

Step 4: Feedback on overall Dashboard layout

Good afternoon, Jane Doe

Your Returns

PREPARE (17) REVIEW (15) E-SIGN (12) E-FILE (57)

Search [] Add Delete Export Lock

Johnny Bravo
1040 | 2014 | FED CT MA DE
Due by: April 15th, 2015
Status: Ready for data collection
0%

John & Mary Smith
Due by: April 15th, 2015
50%

Notification Center

- ⚠ Donny Brasko - Missing 1099-INT Bank of Am
Missing 1099-INT Bank of America
- ⚠ Vinny Muchiato - Needs to complete Deducti
Forgot to fill out child tax deductions
- ✉ Logan Howlett - 1099-INT Wells Fargo inc
Customer forgot to fill out 1099-INT for SabreTooth
- 🔒 Johnny Bravo - Forgot to upload a W-2?
Sent reminder on 02/15/2017

Search [] Add Delete Export Lock

	<input type="checkbox"/>	Status	Client Name	Tax Year	Tax Type	Due Date
1	<input type="checkbox"/>	✓ Send for Review	Landon Register	2015	1040	4/12/201
2	<input checked="" type="checkbox"/>	⚠ Errors on Return	Mary Jane	2015	1040	4/12/201
3	<input type="checkbox"/>	🚫 Need Signature	Jane Doe	2015	1040	4/12/201
4	<input type="checkbox"/>	✓ Send for Review	John Cappolita	2015	1040	4/12/201
5	<input type="checkbox"/>	✓ Send for Review	Donny Brasko	2015	1040	4/12/201

Preparer Dashboard Feedback

Users all gave great feedback on the overall direction of the dashboard.

- “Don't use return. Start return makes the user feel like they are doing the return and not me.”
- “I really like the layout and graphics. Its simple.”
- “Use unique identifiers to separate the name”
- “Switching views would be nice to have. (switching from Grid to simple view)”
- “Ability to flag VIP clients”
- “Notification center could have 100's of people in there. Maybe a filter (aging, VIP, due date)”
- “Both names aren't needed, only primary tax payer is important”

● Success

● Moderate Issues

● Critical Issues

MTI / Key User Test Findings

New Taxpayer Initial Questionnaire Walkthrough

Initial Questionnaire

COMPLETION SUCCESS



STEP 1:

Received an email from preparer, how would you begin?

 **Success**

The user easily completed the step

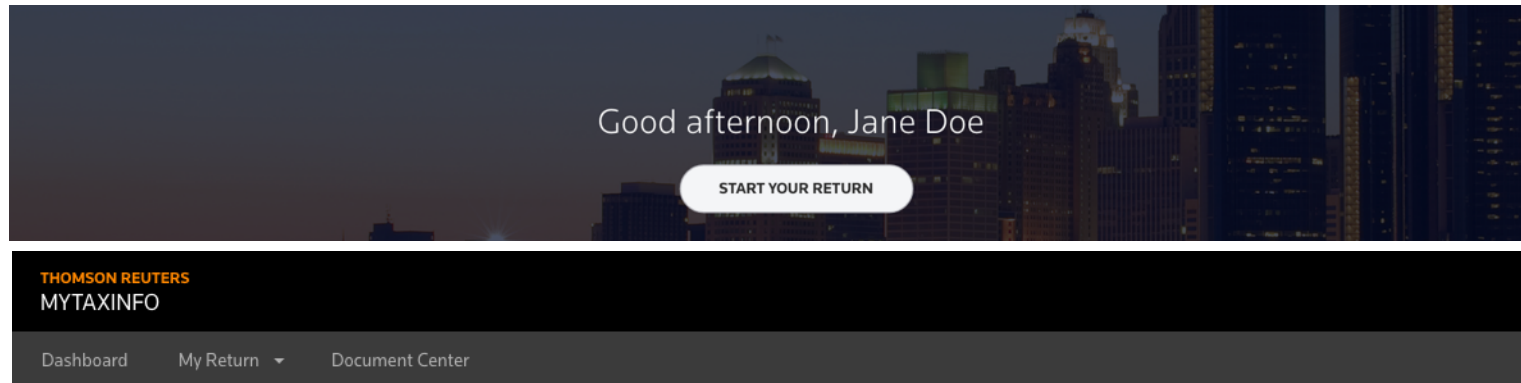
 **Moderate Issues**

The user experienced problems but were able to continue

 **Critical Issues**

Users were not able to complete the step or required assistance from the moderator

Start your return & Overall feedback



Let's figure out a couple things before we start

Personal status

- Single
- Married
- Kids
- Its Complicated

Income

- Own a Business
- Fulltime Employee
- Foreign
- Retired
- Trust
- Interest
- Rental Property
- Wages, Salaries, Tips, etc.
- Brokerage Statements

Deductions

- Retirement Accounts
- Medical & Dental Expenses
- Stock Sales
- Gave to Charity
- Own a House

Credits

-

1 Fill out initial questionnaire

Users understood the intent on the initial questionnaire.

NOTE

- Make sure to include all main buckets
- Separate each section into its own screen
- Simplify terms
- Make sure terms are prevalent to businesses workflow

2 Feedback

- "What does foreign mean?"
- "Add Tax payments"
- "Additional help on the terms would be very helpful"
- "Maybe separate these on to pages instead of 1 screen"
- "What about dependents that aren't kids?"

Next Steps

- **PM** to prioritize of New Taxpayer Initial Questionnaire
- **Product/BA** to further define Big Buckets e.g. Income, Credits, etc. and tooltip content
- **UX** to restructure content and workflow

MTI / Key User Test Findings

Returning Taxpayer Questionnaire Walkthrough

Questionnaire Walkthrough

COMPLETION SUCCESS



STEP 1:

Explain how to go back to where you left off on your return

STEP 2:

Fill out Basic Information

STEP 3:

Explain the summary. Helpful at each step, or after whole section

STEP 4:

Add 2 dependents

Success

The user easily completed the step

Moderate Issues

The user experienced problems but were able to continue

Critical Issues

Users were not able to complete the step or required assistance from the moderator

Step 1: Explain How Go Back To Where You Left Off

Good afternoon, Jane Doe

1 PICK UP WHERE YOU LEFT OFF

HOME DEDUCTIONS CREDITS PAYMENTS

Doe
 Dallas, TX | 111-11-1111

50%

Requires Action

- ⚠ Missing 1099-INT Bank of Am
Please upload or enter your informat
- ⚠ You need to complete Deducti
Missing Information

Missing Items Checklist

- Did you upload a W-2?
- Do you have a 1099-INT?
- Did you upload or enter all receipt
- Did you upload your 8879?

General IRS frequently asked questions
Need to file an extension?
Change account information

How much is the child tax credit?
Change my login credentials
Where do I upload my documents?

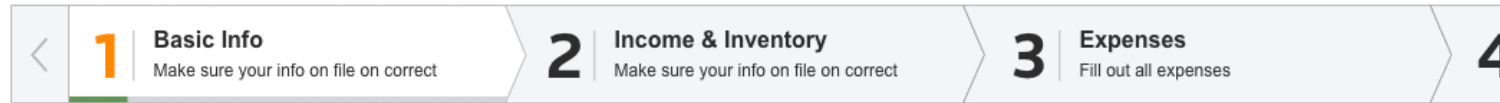
1 Go Back To Where You Left Off

All participants were able to successfully click the “Pick up where you left off” button, without us finishing our question most of the time.

Step 2: Fill Out Basic Information



1 Schedule - C



What is the principal business?

including the product sold or service provided

Business Principal Code

Does the business have another name?

Yes

No

< PREVIOUS

1 Fill Out Basic Information

All participants were able to successfully go through the basic information section up to the summary. **screen from prototype*

Feedback

- Do not use "My Return/Return"(Navigation)
- Input masking & validation were wanted
- Liked the functionality of smart display groups (information displaying after an answer is made)
- Liked the simplicity & seeing only what is needed at the time
- Married/couple info should be filled out at the same time
- Specify "next & previous" buttons (Next: Income | Back: Basic Information)
- Users showed frustration with the Calendar component (birthdate question)
- Steps need to be clear and prevalent to business

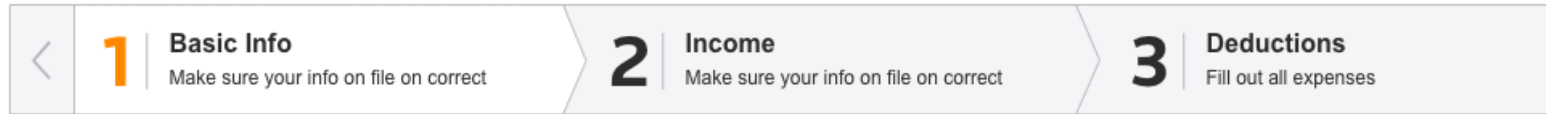
● Success

● Moderate Issues

● Critical Issues

Step 3: Explain the Summary. By Step, Section, or not at all.

2014 Tax Return Summary



1 Personal Information

John Doe | Jane Doe

Name

John Doe

Address

1234 Paradise Lane dr. Cirlce

City

El Paso

State or Province

Texas

SAVE

CANCEL

Postal Code

99087

Social Security Number

111-11-1111

Do you have or were you diagnosed with a permanent disability within the last year?

Yes

Item That can be deleted

Showing Delete(able) field

1 Summary: to be, or not to be.

All participants were asked if they wanted a summary, after each step, at the end of the section, or not at all. Most preferred having the summary after each step.

**screen from prototype.*

Feedback

- 4 out of 5 participants wanted the summary after each step, instead of at the end, or not at all
- **1 participant did not want the summary at all, instead a comparison screen"*
- KPMG Partner

● Success

● Moderate Issues

● Critical Issues

Step 4: Add Two Dependents

ORGANIZER

My Return ▾ Document Center

e - C

1 Basic Info
Make sure your info on file on correct

2 Income & Inventory
Make sure your info on file on correct

3 Expenses
Fill out all expenses

4 Assets
Make sure

How many groups do you have?

Group 1 Group 2 Group 2 Group 2 Group 2 Group 2 More ▾

1 Add Two Dependents

All participants were asked to add two dependents from the questionnaire. This showed a basic example of group information. Users added two dependents with minor notes. **screen from prototype.*

Feedback

- When showing in the demo, the “add dependent” verbiage had users a bit confused. Change to “Add dependent, or Add another”

MTI / Key User Test Findings Taxpayer Dashboard

Taxpayer Dashboard

COMPLETION SUCCESS



STEP 1:

Received a notification to upload a document. Upload the document.

STEP 2:

Upload from dashboard



Success

The user easily completed the step



Moderate Issues

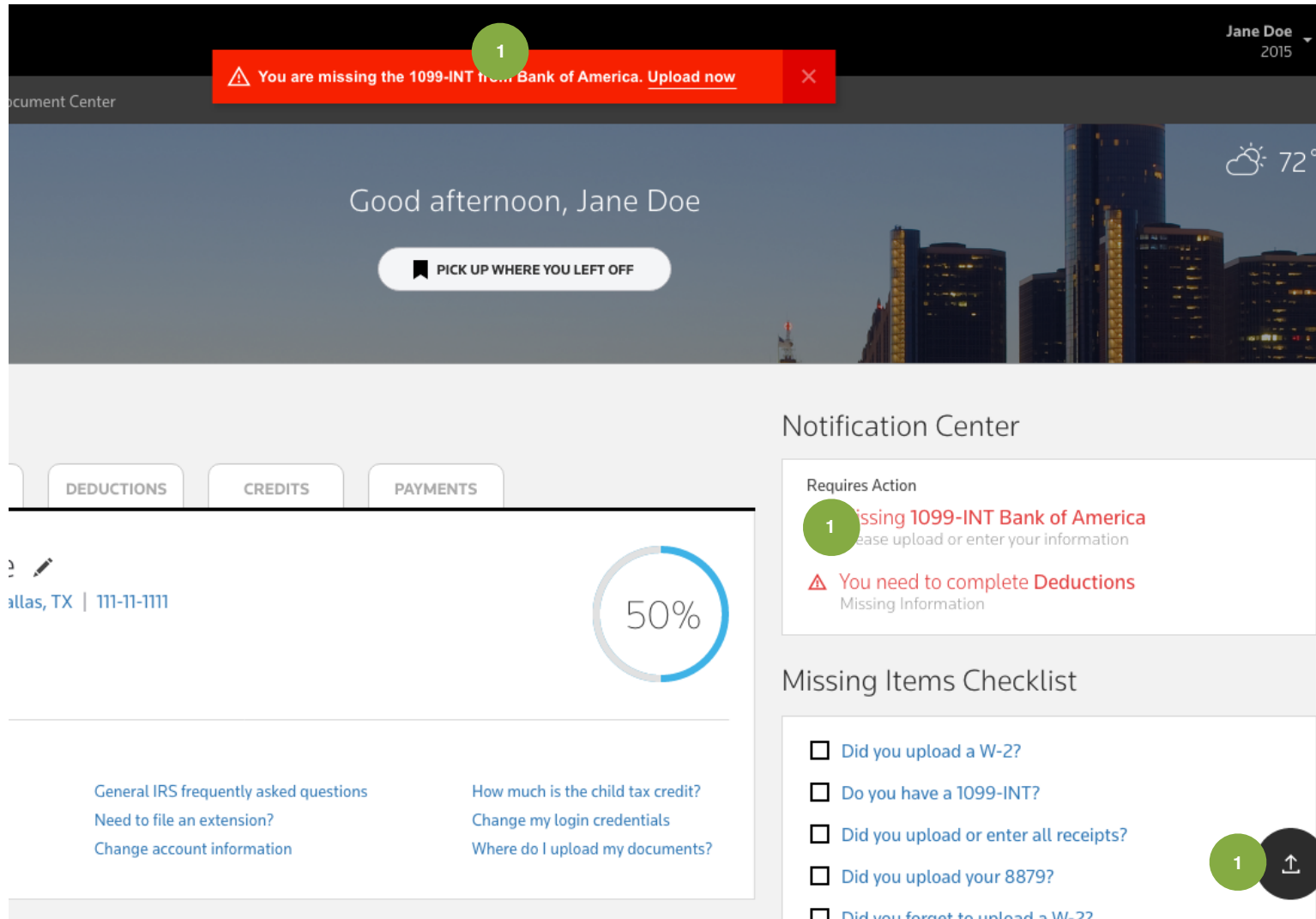
The user experienced problems but were able to continue



Critical Issues

Users were not able to complete the step or required assistance from the moderator

Step 1: Upload Document



1 Upload Document

All participants were asked to upload a document after receiving a notification from the preparer to do so. All users found a way to upload. (Notification alert, Notification center item, and upload button)

Feedback

- Users found the alert to upload first
- Users like the ability to upload from the same screen, instead of going to document center to upload. ***1 user tried to click the document center for this action. not wrong, but didn't think you could upload from the screen.**
- Users did not understand the icon. Thought it meant share instead (ios pattern). **Should change icon to represent upload.**

● Success

● Moderate Issues

● Critical Issues

Step 2: Upload from Dashboard

The screenshot displays a tax dashboard for 'Jane & John Doe'. The main area shows a 50% progress indicator and a notification for missing 1099-INT Bank of America documents. A modal window is open for document upload, showing options to drag a file or browse, and links to iCloud and Google Drive.



Feedback

- "Very clean"
- "Nice look and feel"
- "I like being able to upload directly on the page"
- "Upload icon not clear. Can I share from here?" *bento-icon-upload
- "Helpful links are great, but should be more dynamic"
- "Love the Notification Center"
- "Missing info is great. It should link directly to the missing item, so I can fix it."
- "All of these return categories make sense, except payments"

● Success

● Moderate Issues

● Critical Issues

Standard Usability Score

SCALE

Strongly Disagree		Neutral		Strongly Agree
1	2	3	4	5

RESULTS

4.4 /5

I found the system easy to use

4.5 /5

I found the various functions in the system were well integrated.

4.5 /5

I felt very confident using the system.

4.5 /5

**OVERALL
AVERAGE**

Login

THOMSON REUTERS
MYTAXINFO

TYPE IN YOUR NEW PASSWORD

Use a minimum of 8 characters

Use uppercase and lowercase characters

Use a minimum of 1 number

Use a minimum of 1 symbol

SIGN IN

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Dashboard

THOMSON REUTERS
LIFE DRIVEN ORGANIZER Jane Doe 1040 - 2015

Dashboard My Return Document Center

Notification Center

Requires Action

- Missing 1099-INT Bank of America
Please upload or enter your information
- You need to complete Deductions
Missing Information

Your Return

BASIC INFO

Landon Register 50%

Continue Basic Info

Helpful links
[Where do I ___?](#)
[Where do I ___?](#)

Questionnaire

THOMSON REUTERS
LIFE DRIVEN ORGANIZER Jane Doe 1040 - 2015

Dashboard My Return Document Center

Schedule - C

1 Basic Info
Make sure your info on file on correct

Did you own a business or were you or your spouse self-employed during 2016?

Yes
 No

< PREVIOUS **NEXT >**

Doc Center

THOMSON REUTERS
LIFE DRIVEN ORGANIZER Jane Doe 1040 - 2015

Dashboard My Return Document Center

Document Center

	Date Modified ↓	
MyBusiness2015_1099int.doc	Last modified July 25, 2016	×
MyPersonalW2ThomsonReut...	Last modified July 25, 2016	×
1099-Int.doc	Last modified July 25, 2016	×
1099-Int.doc	Last modified July 25, 2016	×
1099-Int.doc	Last modified July 25, 2016	×
1099-Int.doc	Last modified July 25, 2016	×
1099-Int.doc	Last modified July 25, 2016	×
1099-Int.doc	Last modified July 25, 2016	×
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1099-Int.doc	Last modified July 25, 2016	×

Doc Center Upload

THOMSON REUTERS
LIFE DRIVEN ORGANIZER Jane Doe 1040 - 2015

Dashboard My Return Document Center

Document Center

	Date Modified ↓	
MyBusiness2015_1099int.doc	Last modified July 25, 2016	×
MyPersonalW2ThomsonReut...	Last modified July 25, 2016	×
1099-Int.doc	Last modified July 25, 2016	×
1099-Int.doc	Last modified July 25, 2016	×
1099-Int.doc	Last modified July 25, 2016	×
1099-Int.doc	Last modified July 25, 2016	×


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Doc Center Preview

MyBusiness2015_1099int.doc

Preview



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Details

Type	Word Document
Last modified	August 8th 2016
Size	97 kb
Notes	Here is a custom description for this image. It could host info like notes on what i need to do still with this document to complete my return, or make valid.