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Digital Agent Engagement – Working Together in a digital age

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This pack explains the rationale for moving Working Together to a digital platform, our conversation with agents and how together we plan to transform Working Together.

This is not new work – just a new way of working – it's an exciting opportunity to develop and improve digital skills

Introduction

HMRC want to provide a better service for more agents through digital channels and services, learning from transforming our engagement with SMEs to digital which has had a huge degree of success both in terms of extending customer reach and improving satisfaction ratings.

HMRC acknowledges that there were exemplar Working Together (WT) groups, who acted in accordance with the WT agreement and were particularly proactive.

However engagement across all WT groups was variable and there had been occasions during 2014, when meetings had been cancelled due to lack of attendees.

We wrote to you last August to update you on our work reviews, which recommended that we should work with you to develop digital interactions for WT.

Work has continued to develop a new digital proposition for WT and we undertook a programme of agent engagement during the Spring.

Introduction contd

We are now at an exciting time, innovative work is happening across HMRC to develop agent digital products and platforms to refresh and support Working Together.

We will **immediately move traditional regular face to face local Working Together meetings to a digital platform.**

This pack:

- explains how we have engaged and worked with you to get to this point
- tells you what the recommendations are
- explains what the next steps are and how we will continue to work with you

Please give us your feedback and questions. Please send these to our mailbox team.agentengagement@hmrc.gsi.gov.uk marking the subject heading 'WT in a digital age'.

Theresa Middleton



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Background

Last year we told you we wanted to engage with you to take the best of WT and move it to digital channels.

We want to move WT to a digital platform so we can:

- enable you to discuss issues with subject matter experts directly in real time
- save resources from both you and HMRC
- reach more agents



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How we have engaged and worked with you

Over the last few months we have been engaging with you about the proposed changes:

- Autumn 2014 – Agents were invited to email feedback to us following the initial announcement of the proposed move to digital.
- December 2014 – We established the WT Strategic Group made up of HMRC and representatives from the biggest tax Professional Bodies. This group oversees the WT move to digital and is responsible for agreeing the way forward with the agent community.
- February/March 2015 – Online Survey with over 300 agents responding.
- February/March – 20 regional face to face, and 2 digital events with 400 agents from across the UK.
- 19 June – meeting with WT Strategic Group – to discuss and agree the new WT proposition.



Outcomes of Agent Engagement



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Outcomes of Agent Engagement

We asked you:

- What are the challenges and barriers to engaging with HMRC digitally
- What needs to be undertaken face to face
- What are the opportunities and benefits of engaging digitally

Challenges and Barriers – what agents told us

- Agents are concerned about Broadband availability, equipment and customer user capability.
- Security, confidentiality and trust in digital communications are things agents worry about.
- Agents think digital will mean a loss of opportunity for shared learning and experience; concerns that misunderstandings and misinterpretation can arise more easily through digital channels.
- Agents are concerned about possible incompatibility between agent and client software and agent and HMRC. Help may be needed with security systems for sole practitioners with limited funds. Not everyone has access to a smart phone, and data usage costs are a concern.
- Agents raised concerns about whether HMRC had the digital capability to move WT to a digital platform.



The Benefits of Digital Engagement - what agents told us



The Opportunities of Digital - what agents told us

Educational

A comprehensive and up to date website

Provision of a transparent service

Improved communication channels for issues and feedback

Central points of contact for Heads of Duty

Engagement with more HMRC staff

Maintenance of conversations between face to face events

Forums to be provided for electronic communication and discussion

Ask questions of policy directors regarding legislation



Working Together in a Digital Age the Way Forward



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The Way Forward (1)

Taking account of what you have told us we made the following recommendations to the WT Strategic Group. All the recommendations were agreed.

- Drive forward HMRC's digital agenda moving regular local WT meetings to a digital platform immediately.
- Recognising you want a regional framework with a named contact, we will develop:
 - A number of regions with a named, dedicated contact in HMRC.
 - A rolling programme of digital meetings with each region taking responsibility to host.



The Way Forward (2)

- Wanting to take the best of Working Together we will hold digital meetings that:
 - Are jointly hosted by HMRC and agents.
 - Have standard agendas to update WT issues plus other items which agents and HMRC jointly agree should be included.
 - Enable Regions to discuss specific issues or topics with the Subject Matter Expert joining.
- Face to Face meetings will be held where there is a need, for example:
 - To workshop issues relevant to business issues and the agent strategy.
 - HMRC will also look for opportunities to support agent sponsored events.
- Learning from agents not previously involved in Working Together, we will
 - Open digital Working Together meetings to all agents.
 - Give agents the opportunity to join all WT meetings during the year or just those hosted by their region.



The Way Forward (3)

Alongside digital WT meetings, and putting you at the heart of what we do, we want to build on the opportunities for digital engagement and work with you to develop and test other digital channels including:

- Online formal Forum to raise possible widespread issues.
- Using Social Media such as LinkedIn providing transparency as issues are discussed and enabling you to engage interactively with HMRC and each other.
- Informal Forum for you to ask questions/queries – answered by fellow agents and HMRC.



The Way Forward (4)

- Share identified widespread issues digitally, enabling you to vote on which you want to prioritise to resolve.
- Work with you to develop and publish the rolling programme for the digital meetings and supporting agendas.
- Looking at suitable opportunities to use webchat.
- Developing SMART questions to help direct you to the right service, or to self serve on Gov.uk. Reducing the need/cost of phoning the contact centre.



Next steps

Now the recommendations have been agreed by the WT Strategic Group we will work with you to make them a reality.

- **Right now** - continue to discuss any WT issues with your group and if appropriate submit these via your Specialist Agent Manager contact.
- **In July and August** we will hold two digital meetings to give you an opportunity to comment and input to the finer details of Working Together in a digital age. We realise this is the holiday period but hope you can attend one of them. Further information about these will be issued shortly.
- Develop practical plans for setting up WT digital meetings as well as agreeing with you what we will discuss at these.
- Develop the rolling programme of Working Together meetings.



Questions and Answers

1. Is this the end of Face to Face meetings?

No – we will still use face to face when we need to for example to workshop an issue, or part of the strategy. We will also look for opportunities to support Agent sponsored events.

2. What will happen to the Issues raised?

Issues will continue to be raised as they are now – client specific come through the Agent Account Manager service, and widespread come through the Working Together network and the Specialist Agent Managers or through the Professional Bodies via the Issues Overview Group. Issues can then be discussed and updated at the WT digital meetings if needed

3. How will regional representatives be appointed?

This decision will be taken by the Professional Bodies, please contact your WT Professional Body Representative, the latest details are available in the ‘Contact information for the other professional bodies’ section of [Agent Update 48](#) (page13).



Questions and Answers

4. I'm not a Professional Body member, how will I find out more information?

Subscribe to email alerts on [GOV.UK](https://www.gov.uk) to receive Agent Update and other tax professional updates and check out the '[HMRC working with tax agents blog](#)',

5. I'm a Professional Body member, how will I find out more information?

a) if you are already involved with WT, your Professional Body will publish details shortly and your Specialist Agent Manager will be in touch. We will also keep you updated via the '[HMRC working with tax agents blog](#)', Agent Update and by email if you have subscribed to email alerts on [GOV.UK](https://www.gov.uk)

b) if you have not been involved with WT before, your Professional Body will publish details shortly. We will also keep you updated via the '[HMRC working with tax agents blog](#)', Agent Update and by email if you have subscribed to email alerts on [GOV.UK](https://www.gov.uk)

