Use this **Taxpayer Experience map** to understand your customers' experience

Effective programs are designed with the end user in mind. Use this *Taxpayer Experience Map* to better understand how your customers experience your current program design, including the needs and perceptions that they have, and the impressions they provide about their experience at different stages. Then, you can reflect on that customer experience and make changes to better serve customers and achieve the goals of your organization.

In the context of encouraging tax time savings, you'll want to focus on factors that get a taxpayer to act on a savings opportunity. "Conversion" represents the rate at which taxpayers engage beyond tax filing, such as showing interest and engaging in the saving opportunities you offer. This taxpayer experience mapping process could also be used to integrate other financial empowerment strategies besides saving. For example, in addition to filing a return you may be encouraging taxpayers to participate in financial coaching. In that case, the rate of conversion will reflect the effectiveness of your efforts to get taxpayers to consider and then complete a coaching session.

Customer journey mapping is a method of documenting how people experience interactions with a brand, program, product, or organization. This *Taxpayer Experience Map* applies that method to the context of a community tax program. It helps you to experience your program from your customers' points of view.

Using this tool

The *Taxpayer Experience Map* identifies phases of the taxpayer's interaction with a typical VITA program from engagement as tax season approaches to filing at your tax site to maintenance of the customer relationship between tax seasons.

Customize columns for your program

The columns in the Taxpayer Experience Map represent typical steps in these phases. Because no two community tax programs are exactly alike, you may want to customize the columns. You can skip columns that don't apply to your program. You can also use a pen or pencil to relabel columns on your printout of this tool.

Fill out each row

The rows in the tool allows you to better understand the taxpayer's experience, identify mismatches and achieve better outcomes for your taxpayers at each step in your program's process. First, map the customer journey of the just-completed tax season. Make sure to record what has happened, not what you project or hope will happen in the future. use the bottom two rows to record your ideas for improvements for the coming season.

Be specific about your audience

You may want to complete the Taxpayer Experience Map based on the experience of your clients in general. Alternatively, you might want to identify a specific segment of the people you serve—such as tax filers above age 65, or tax filers with young children—and complete a map with just one group in mind. If you want help defining the segment of your client population, consider using the optional Taxpayer Persona Worksheet at the end of this tool.

Engagement steps (Pre-filing)

What savings-related action do you want the taxpayer to take? (conversion)	

Look back at last year

Steps	Pre-filing Outreach	Appointment	Other:	Other:
What touchpoints (communications and interactions) did you have with taxpayers?				
What result did taxpayers want?				
How did taxpayers respond?				
What response did you want?				
What is the operational or programmatic purpose of the step?				

Look forward to next year

Steps	Pre-filing Outreach	Appointment	Other:	Other:
How could you make the experience better?				
What can be done to get the taxpayer to act on your savings opportunity? (conversion)				

Filing steps (Taxpayer at tax site, served virtually or accessing self-preparation assistance)

What savings-related action do you want the taxpayer to take? (conversion)	

Look back at last year

Steps	Intake	Waiting	Preparation	Review	Exit	Other:
What touchpoints (communications and interactions) did you have with taxpayers?						
What result did taxpayers want?						
How did taxpayers respond?						
What response did you want?						
What is the operational or programmatic purpose of the step?						

Look forward to next year

Steps	Intake	Waiting	Preparation	Review	Exit	Other:
How could you make the experience better?						
What can be done to get the taxpayer to act on your savings opportunity? (conversion)						

Maintenance steps (Post-filing)

What savings-related action do you want the taxpayer to take? (conversion)	

Look back at last year

Steps	Post-Filing	Off-Season	Other:	Other:
What touchpoints (communications and interactions) did you have with taxpayers?				
What result did taxpayers want?				
How did taxpayers respond?				
What response did you want?				
What is the operational or programmatic purpose of the step?				

Look forward to next year

Steps	Post-Filing	Off-Season	Other:	Other:
How could you make the experience better?				
What can be done to get the taxpayer to act on your savings opportunity? (conversion)				

Taxpayer Persona Worksheet (Optional)

Persona: "Persona" is a generic description of the taxpayer whose experience you are mapping. If your focus is the experience of your typical taxpayer client, this persona definition exercise may not be necessary. However, if you are focusing on a segment of the taxpayers you normally serve – such as returning clients, or taxpayers with young children – reflecting first on the defining characteristics and goals of that specific population will enhance your ability to map the taxpayer experience from their perspective.

1 **Describe five characteristics of your target taxpayers. Focus on characteristics that relate to whether, when, and why they seek your service and what makes them different from your typical client.**

CHARACTERISTIC 1

CHARACTERISTIC 2

CHARACTERISTIC 3

CHARACTERISTIC 4

CHARACTERISTIC 5

2 **Name three reasons why taxpayers will seek your service rather than other options.**

REASON 1

REASON 2

REASON 3