

Design 4 Delight Case Study: Tax Dev Local Builds

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Contents

:: Executive Summary

- : Overview
- : Key Learnings

:: How We Did It

- : The Plan
- : Learnings

:: Appendix

- : D4D Brief
- : Letters

D4D Case Study: Tax Dev Local Builds

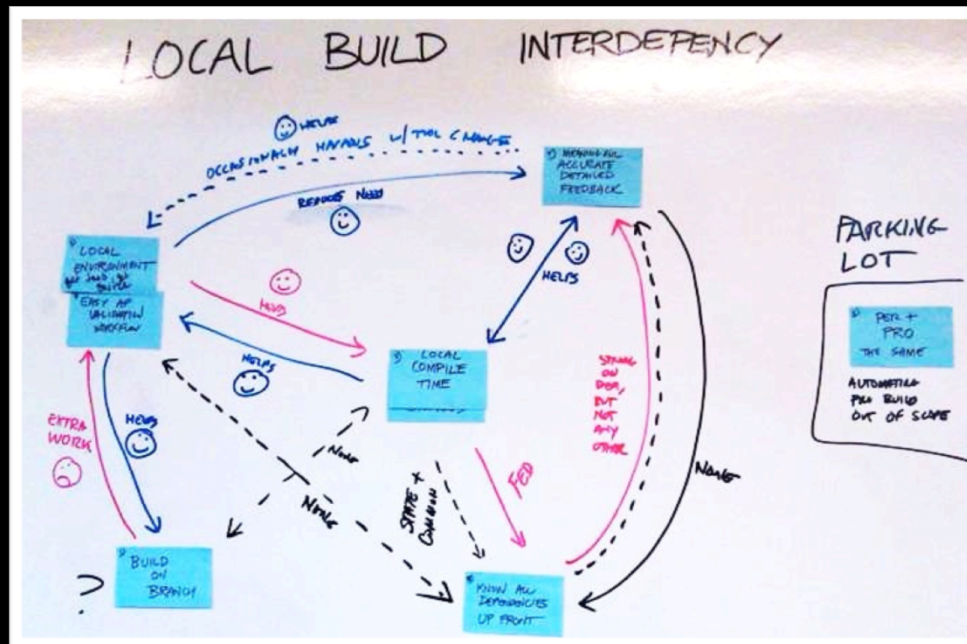
Executive Summary

*“I’m really glad to be a part of
a solution-driven team...”*

- Participant

Revamp Tax Dev tools/work flows to reduce server build errors

Cross Functional Team: Tax developers, tax engineers, tools developers, TPS, IS, FPS, SCM



Customer Journey Line from one of our D4D sessions

Problem Statement

The average Tax Developer states that less than 25 % of their time is spent on tax related work. The other 75 % is spent on managing processes and tools. If time spent on processes and tools decreases, more time will be spent on tax accuracy leading to better customer tax outcomes and higher employee engagement.

Tool Change Outcome

Local Build time from 35 min. to >5 min. (17x improvement)

Process Outcome

Save org 20-30k hours/year

Key Learnings

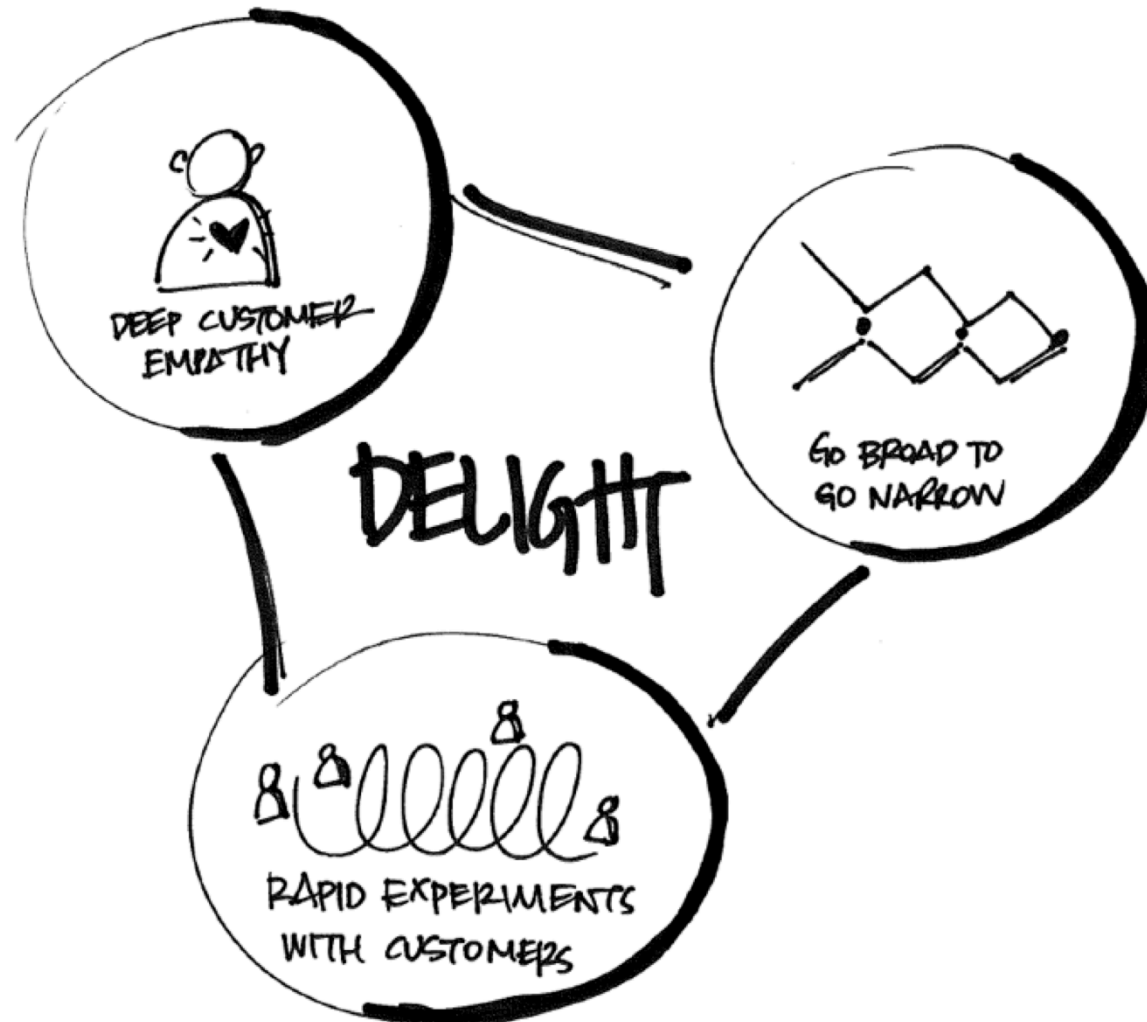
- > **Involve affected employees as key partners from the kickoff.** They felt invested because they were empowered to own the outcome.
- > **Know your audience.** We tailored activities and working sessions based on the audience analysis we did. For this particular group, small groups worked best.
- > **Homework works!** The participants met with their internal customers prior to the first working session. As a result, they came in with deep customer empathy and ready to tackle the problem.
- > **Be unconventional.** We held stand up meetings (no PowerPoint) at the Coffee Shop. They went by quick, and folks appreciated the free cup of Joe.



One of our Coffee Shop meetings

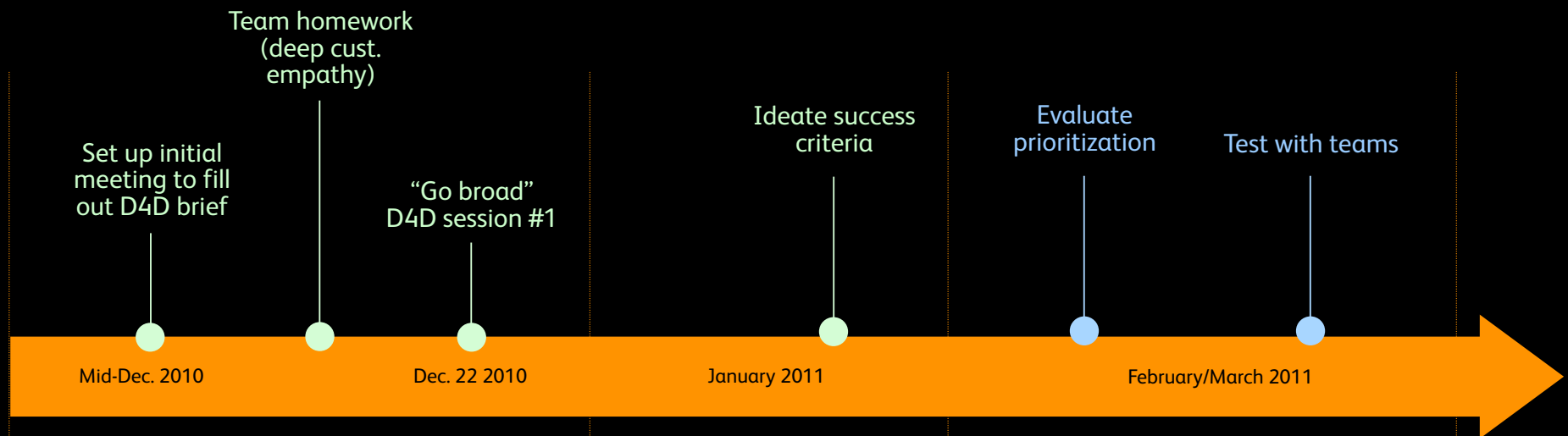
D4D Case Study: Tax Dev Local Builds

How We Did It



The Plan

● IC/Stakeholder ● Stakeholder



Pre-session Homework

Deep Customer Empathy: Tax Engineers (TE) did a Follow Me to Work (a modified Follow Me Home) with Tax Devs (TD) to watch what they do. They followed up with a few open-ended questions. 2-3 TE members visit per TD office.

Homework (to be done before the Root Cause analysis session)

1. You will be assigned a Tax Dev person to follow. Make a 45-minute meeting with them before [date here]
2. Ask your Tax Dev Customer to show you a simple change they would make—observe them make that change (10 minutes)
 - a. Take notes on the steps they make and how their emotions change at each step
3. Ask them to make a difficult change—observe them make that change (15 minutes)
 - a. Take notes on the steps they make and how their emotions change at each step
4. Interview your customer: (20 minutes)
 - a. What makes a change difficult or easy to verify? Why?
 - b. When do you decide to do single compiles vs. full local build? At what point do you check in your change? Why? (Get details on why they make the decision, and how it happens)
 - c. What is the easiest part of verifying changes? Why?
 - d. What is the most difficult or frustrating part of verifying changes?
5. After you leave: capture your top 5 Ahahs about what is causing Tax Dev customers to check in changes that break the build (this can be technical, process, emotional, decision-making patterns)



Session #1: Go Broad to Go Narrow

Root Cause Session: Folks shared their big “Aha’s” from their homework around what are the biggest causes of checked-in breaks. Looked for overlaps/commonalities, then went narrow.

By the end of the D4D Session, we will have...

- Identified top 2-3 root causes of the TD-caused server breakage problems, validated by our TD customers
- Tax engineers have empathy and understanding of the tax development predicament
- Tax engineers and tax developers start effectively collaborating on E2E solutions

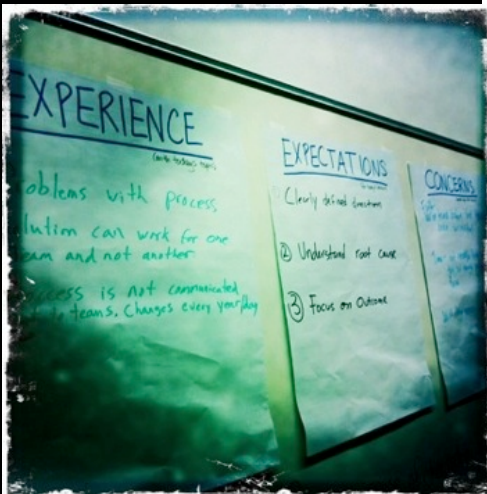
The intended impact to the business will be...

For this session:

- Identify top 2-3 actionable root causes of the TD-caused server breakage problems, validated by our TD customers, that will drive our efforts towards reducing server breakages 95%
- Much better communication and shared knowledge between TE and TD

Ultimate goals of the initiative this session ladders up to:

- Reduce server breakages by 95%.
- 'Fast and easy' (as defined by Tax Developers) local verification
- Doesn't stop me from working (i.e. have machine tied up while doing a build)
- Increased productivity for tax development and dependent teams



Follow up sessions: Success Criteria and Prioritization

Going Narrow:

- 1) Getting the team to define their own success criteria for the project.
- 2) Helping sponsors define their prioritization and evaluation criteria.

First, help the team find the right problem to solve. In tandem, the team knows some of the D4D techniques and is getting adept at practicing them on their own.

ICs were able to greatly taper off our level of involvement; moving from driving everything to providing occasional facilitation and advice.

4. Dependencies

4a. Before I make a change, determine who am I going to affect and do that under 4 clicks 90% of the time

- Right now I may not find out until the end of the workflow that I impact other people, would like to make that decision upstream to be more efficient
- Borderline of scope due to interaction with others.
- Bucket: Dependencies

4b. I know down-stream dependencies; I know the forms and field IDs I affect in EF, Interview, Diag, Help, etc., by a tax data-model (PT or calc) change I make.

- Bucket: Dependency

4b. I have a clear dependency tree for fields on a form. I know based on the name I'm giving it if it will collide with other fields, if I've correctly defined it for where it will be used, and I have context to where it is being used (e.g. 4 different states).

- Bucket: Dependency

5. Error Messages

5a. Fail as soon as possible with specific error messages and line numbers, especially for interview

- "ASAP": if you're doing a local build, just stop as soon as you encounter the first error
 - i. Check box on the PER full formset build to stop on first build
 1. Doesn't work for Pro
 2. Doesn't work for people who currently
- Interview gives you a line reference in the error message
- "specific" = messages are generic, want more detailed i
- Bucket: Error messages



Mid-project check-in: How's it going?

Roundtable with all key players: This is the mid-project check-in to see how the team feels around the question: "Are we on course to finish a successful project or do we need to course correct in order to meet our project goals?" Using the Hello Game as a jumping off point to facilitate a rich discussion with the team and sponsors.

Questions

(1 each per flip chart, folks use post-it notes to write down their comments):

1. What's going well?
2. What could we be doing better?
3. What aren't we doing that we should be?

Learnings: Be Unconventional

Here was the meeting agenda:

- > Start: 9:44. End: 10:07. (Who can resist meeting times like that?)
- > Literally a stand-up. No PowerPoint. No stuffy conference room. 1 sheet of paper, with all the info in 24 pt. type on 1 side, and project team names/pics on other side.
- > Teased them to attend by letting them know there'd be a Coffee Bar open tab during the meeting: free coffee and pastries!



One of our Coffee Shop meetings

Here was the meeting agenda:

- > 'Know all that stuff you've been wanting fixed for years and years? We're starting now!'
- > 'What does success look like? You get to define it. You know what you need far better than anyone else.'
- > 'Here are the tools to define that criteria. Ping us if you need any help.'
- > 'We're done one minute early. Ciao!'

We had full attendance (a miracle this time of year). Attendees said they're excited to have so much of a voice and autonomy. Not a single person gave negative feedback of the meeting not being worth their time (another rarity given workload and stress).

Lesson learned: you can kick off a major initiative in the middle of crunch time.

Appendix

Initial Letter

Reach out from DIG to IC giving them project scope.

Hi Kara.

I met with Nicole and Susan today about their Tax Dev Dilemma, for which they want Innovation Catalyst help to take a D4D approach to solving. I mentioned I thought you were the perfect match for this type of project because of your superior facilitation skills and your ability to approach the problem with a large D4D toolset. (as an aside, they know you by your great reputation!)

At a high level to give you a sense of potential scope, they have identified 6 problem areas that are causing an uproar in VOE from the Tax Dev Community. They have also gotten some empathy for their customer (Tax Dev and Engineering folks) through the “Unblock parties.” They will need to validate that these are true problem areas, prioritize the top 2-3 problem areas to tackle. Then, they will likely need to understand how and why the problems happen, the root causes, and get some more empathy for TD folks to understand why they make their choices in workflow; eventually getting to a problem statement. **Then, they will need to come up with solutions that work for the customer.**

The timeline is they want to start pretty immediately, and get a sense for what resources they would need to execute the work (both the D4D engagement and the final solutions) in the next couple weeks. They want to really learn how to apply D4D to more of their daily work and big problems, so they would love it if an IC can stay with them (at least on a mentoring basis) until they have a solution and are executing.

Kara, do you have the bandwidth to be their IC partner for this project? If so, please CC all and then you guys can take off together. I am always here for mentoring or partnering whenever you want to bring me in.

Let me know what I can do to help!

Rachel

Transition Letter

Once the team has a handle on D4D.

Hey Susan & Nicole,

When I think of where we've come at the beginning of December (see below) to today (Happy February!), the past 7 weeks have been a great journey to help you guys **reach your goals using Design for Delight**.

In the beginning, it was heavy on the catalyst facilitation as you learned D4D, and it's been a pleasure to see it gradually transition to **you two leading the way** with support from David and I. That means you're really **internalizing the D4D process**, which is awesome! It's also exciting to see the Devs and Engineers so involved and really **owning their outcome**, as was evident in the past few meetings.

I originally committed my December catalyst time to this project, knowing we'd probably bleed some into January. Since we're now into February, I'm ramping up my other commitments — which means I'm going to need to transition off this project.

Again, I think you're in a GREAT place over and **you're thisclose to your final product**. You've internalized D4D (which is all a gal could ask for!), and have the end in your sights. If, however, you think you'll need another catalyst to help you down the final stretch, please let me know and I'll let Rachel Evans (cc'd here) know so she can help find someone. I'm also available to answer questions/ease the transition, if need be.

Thank you so much for allowing me to go on this journey with you both — it's been such a fun ride! :)

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