

UX Case Study: Establishing a State Tax Account Registration Process

Role: Implementation Manager / Process Designer

Project Type: Process Optimization, Service Design, Cross-team Collaboration

Duration: 3 months+

Overview

Justworks Payroll clients were facing penalties and interest due to delayed state tax filings caused by inefficiencies in the state tax account registration process. This project aimed to bring the registration process in-house, optimize workflows, and improve communication between teams — ultimately reducing late filings, improving client satisfaction, and cutting costs.

Problem Statement

- Clients were receiving penalties due to late state tax filings.
 - The previous registration process relied on a third-party provider, which caused delays and poor communication.
 - Internal workflows lacked automation, clarity, and consistent tracking, leading to inefficiencies and errors.
 - Communication gaps between Tax, Implementation, and Billing teams caused follow-up delays and client frustration.
-

Goals

- **Eliminate penalties and interest** by ensuring timely registration and filings.

- **Streamline internal workflows** to reduce processing time and errors.
 - **Improve cross-team communication** and coordination.
 - **Implement better tracking and reporting** for registrations and billing.
 - **Increase client satisfaction** through transparency and proactive support.
-

Research & Insights

- Conducted interviews with key stakeholders across Tax, Implementation, and Billing teams.
- Mapped the existing registration process, identifying pain points and inefficiencies.
- Uncovered lack of automation, unclear roles, and insufficient client communication as major blockers.

Stakeholder map:

Stakeholder	Role / Responsibility	Interaction Points
Clients	Provide consent & documentation for registration	Receive automated reminders, billing updates
Implementation Team	Initiates registration, coordinates client outreach	Works with Tax Team, uses automation tools
Tax Team	Manages state tax registrations & filings	Tracks status, follows up with clients and teams

Billing Team	Handles billing after successful registration	Coordinates billing timing with Implementation and Tax
Customer Support	Addresses client inquiries & redirects to internal resources	Uses Help Center and communication channels
Project Manager / UX Lead	Oversees process design, cross-team collaboration, and training	Facilitates meetings, gathers feedback, updates SOPs

Solution Design & Implementation

- Developed new Standard Operating Procedures (SOPs) clarifying team responsibilities and workflows.
 - Implemented automation for form submissions, tracking, and reminders to clients and internal teams.
 - Established communication protocols for timely follow-ups and updates.
 - Created internal resources and training sessions to support smooth adoption of new processes.
 - Set up a Slack channel for ongoing feedback and rapid issue resolution.
-

Hypothesis & Testing

- **Hypothesis:** Automating registrations and clarifying workflows would reduce processing time and errors, leading to fewer penalties and improved client experience.
- Pilot runs and continuous feedback helped refine SOPs and automation workflows before full rollout.

Results

- **40% reduction in internal processing time** through automation and SOP standardization.
- Significant **decrease in client penalties and interest** due to timely registrations.
- Improved cross-team collaboration and communication.
- Reduction in client outreach regarding state tax registrations, easing support team workload.
- Increased client satisfaction, particularly due to transparency and no upfront billing before registration completion.
- Justworks Payroll saved costs by insourcing the registration process and capturing 100% of service fees.

Process Map (Before & After)

Before: Inefficient Registration Workflow

1. Client signs up for Payroll service
2. Request for state tax registration sent to **third-party provider**
3. Manual follow-ups between Third Party and internal Tax Team
4. Delays due to slow processing and communication gaps
5. Late state tax filings → penalties and interest for clients
6. Customer Support receives increased penalty-related inquiries

After: Optimized Internal Registration Workflow

1. Client signs up for Payroll service

2. Internal Implementation Team initiates registration using **automated form submission system**
 3. Automated reminders sent to clients for consent & document submissions
 4. Registration status tracked in centralized system accessible to Tax, Billing, and Support teams
 5. Regular cross-team communication and follow-ups via Slack and automated alerts
 6. Timely registration completed → on-time tax filings, no penalties
 7. Clients billed only after successful registration
 8. Reduced client support inquiries, improved satisfaction
-

Reflection & Next Steps

- This project highlighted the importance of cross-team collaboration and iterative process design in improving user and employee experiences.
- Moving forward, the new SOPs and automated reminders will be expanded to other customer support workflows.
- Continuous client and internal feedback will guide further refinements to maintain efficiency and client satisfaction.