



Consolidation project

# What did we make?

## Consolidation walk through

A large purple rectangular graphic containing the following elements:

- A 2x2 grid of four small images: top-left shows a warehouse with a forklift; top-right shows a woman in a business suit talking on a phone; bottom-left shows two men in blue shirts standing next to a white van; bottom-right shows two men in blue shirts standing next to a large stack of white bags.
- Text to the right of the grid: "a guide to forming and operating as a consolidated group for income tax" in white, bold, sans-serif font.
- Four colored squares in a row: yellow, red, green, and teal.
- The Australian Taxation Office (ATO) logo at the bottom, consisting of the letters "ATO" in a stylized, outlined font, with "Australian Taxation Office" written in a smaller font below it.

## The Consolidation walk through was . . .



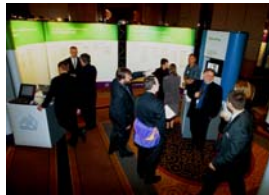
pages 3 and 4

a portable, professional  
and flexible exhibition . . .



page 5

that provided a  
conversation space . . .



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for users of the Consolidation  
regime including Tax Office staff  
to make sense of the change.

### **It was also a place to showcase . . .**



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Consolidation products . . .



page 8

and user testing of these  
products in action.

## A portable and professional exhibition

The walk through needed to be **portable** - it was held in eight locations across Australia. So, we needed to be able to assemble it, dismantle it, move it and then reassemble it in a different location each week.

We used a light weight yet very sturdy display system - *Premier* - made by a firm called Photobition. The display stands were made of collapsible frames and flexible panels that were attached to the frames with magnetic strips. The display material we prepared was printed on these panels by Photobition. The frames and panels packed away neatly into green bins for transportation.

The assembled display stands looked very **professional** - each panel was lit from above and the quality of the printing on the panels was very high. The green bins used to store the display stands were turned into tables by joining two bins together and attaching some ATO artwork panels.

Twenty one display stations were created for the walk through. In addition, four video towers played footage of people talking about Consolidation - Senator Helen Coonan, the Minister for Revenue and Assistant Treasurer, and John Ralph talked about the intent of the measure and potential users of the regime talked about particular issues of interest to them and their organisations.

In addition to the display stations a range of other equipment (e.g. litepro, 10 laptop computers, 4 DVD players) and materials (e.g. copies of Bills, Explanatory Memorandum, Reference Manuals, press releases and other educational material) was required to support the walk through. In all some 10 cubic meters of equipment and materials needed to be transported to each venue - all of this equipment was packed into two shipping containers for transportation and storage.

Transportation services were provided by the Tax Office's contract courier - TNT.







## A conversation space

The walk through was a **conversation space** structured around the phases of the Consolidation pathway - Choosing, Forming and Operating as a Consolidated group.

We used colour to identify each phase of the pathway to give participants a visual signal that they were entering a new phase i.e. Choosing was yellow, Forming was red, Operating was green and other topics (e.g. website & ITD) were blue.

**Tax Office specialists** were available in each area of the walk through to help participants make sense of the material on display. The total number of specialists required to support the walk through varied from location to location and ranged from 5 to 18 people.

Having these people available was critical to the success of the event as we knew from our user research that participants would want to talk with someone who could help them understand what Consolidation meant for them and their business.

The display material was a **conversation aid**. The structure of the information on display helped participants to see the high level concepts associated with each phase of the pathway e.g. *one in all in*.

More detailed information about how these concepts would be applied in practice was also available in a **Reference Manual** which was handed out to people as they entered or left the walk through.



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## For users of the Consolidation regime

In all 2,146 people walked through the walk through!

956 of these people were **potential users** of the regime - business operators and managers and advisers and intermediaries in the tax system.

1,190 of these people were Tax Office staff who would be responsible for administering the Consolidation regime. While we didn't know it at the time we were designing it, the walk through ended up being a useful **internal communication tool** that enabled the Tax Office to send a consistent message to staff about the new regime.



## A place to showcase Consolidation products

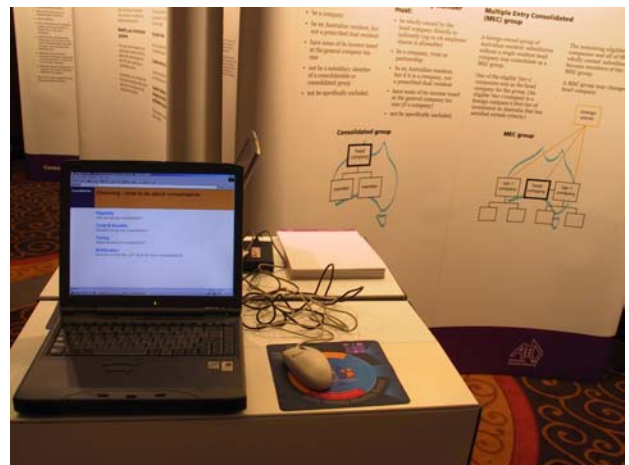
At various points around the walk through people could **use some of the products** that were being made to support the implementation of Consolidation.

The Tax Office product developers responsible for designing these products were on hand to answer questions about the products and when they would be available.

The products showcased at the walk through included a web-based notification tool, notify forms . . . .

. . . and a web-based tool designed to help taxpayers and their advisers determine the composition of their consolidatable group.

The Stakeholder Management Stream of the Consolidation project used the walk through events as an opportunity to market the Consolidation site on the Tax Office's website and obtain feedback on the usability of this site.





## A place to showcase user testing in action

At the walk through event held in conjunction with the Corporate Tax Association Convention we had a **user testing station** in the Integrated Tax Design area of the walk through.

We recruited 'users' from the Corporate Tax Association and a firm of tax agents to participate in usability and usefulness tests for a selection of Consolidation products.



**Product developers** from the Consolidation project team acted as observers at the testing sessions. This provided them with a great opportunity to learn 'how-to' test their products with real users. The testing sessions were valuable as they revealed a number of enhancements that could be made to existing products to make them more usable, useful and desirable.

Walk through **participants could observe** what was going on in the testing station via live footage on monitors at the front of the user testing station. (There was no sound feed to the monitors as we felt this would be a bit intrusive for the people doing the tests.)



The user testing station at the Corporate Tax Association Convention let participants see first hand what we mean by user testing and how it fits within the broader context of Integrated Tax Design.

We recorded the testing sessions on video. The footage we obtained was used to make a short video on user testing which was shown in the Integrated Tax Design area at subsequent walk through events.

