Implementing social media in the Tax Office – a case study
Presentation overview

- Part one: Introduction to the Tax Office’s channel strategy
- Part two: How and why we implemented new media tools during Tax Time 2008
Channel Strategy – outlines the Tax Office’s preferred channel mix for delivery, taking into account client preferences and our business intent. This is supported by individual channel strategies.
### Tax Office – hierarchy of channel preferences

<table>
<thead>
<tr>
<th>Information</th>
<th>Interaction</th>
<th>Transaction</th>
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</thead>
<tbody>
<tr>
<td>On-Line</td>
<td>On-Line</td>
<td>On-Line</td>
</tr>
<tr>
<td>On-Paper</td>
<td>On-Call</td>
<td>On-Call</td>
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<tr>
<td>On-Call</td>
<td>On-Paper</td>
<td>On-Paper</td>
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<tr>
<td>On-Site</td>
<td>On-Site</td>
<td>On-Site</td>
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</table>

### Balancing Community and Tax Office channel requirements

<table>
<thead>
<tr>
<th>Community</th>
<th>Tax Office</th>
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<tbody>
<tr>
<td>convenience</td>
<td>government policy</td>
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<tr>
<td>Preference</td>
<td>privacy/secrecy</td>
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<tr>
<td>cost</td>
<td>cost of compliance</td>
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<tr>
<td>timeline</td>
<td>efficiency</td>
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<tr>
<td>need for certainty</td>
<td>timeliness</td>
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<tr>
<td>technology</td>
<td>service standards</td>
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<td></td>
<td>client preference</td>
</tr>
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<td></td>
<td>infrastructure</td>
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<td></td>
<td>compliance risk</td>
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A case study by the Australian Taxation Office
Tax Time 2008

- Integrated strategy
- Budget challenges
- Need to achieve market cut-through
- Reach target audiences (youth and over 55s)
- In addition to mass media (PR and advertising) opportunity to adopt new media initiatives to help paper lodgers move online:
  - bulk email / refer-a-friend
  - SMS
  - multi-media video on ato.gov.au
  - Facebook
Strategy objectives

- Strategic approach: **well targeted, well timed, cost-effective media** to promote Tax Time to all self preparers.

- Communications objective:
  - educate taxpayers who lodge via paper (1.1 million people) about our preferred lodgement channel so they lodge correctly online by 31 October.
  - retain existing e-tax users (1.9 million people) so they don’t revert back to paper lodgement

- Business objective: increase lodgements
Why a Facebook Page for e-tax?

*Note: by the Australian Taxation Office, not about the ATO*

- Audience reach (18-24 year olds)
- Appropriate product (e-tax is a mature product with high retention rate)
- Issues management approach
- Integrated with other marketing communications activities (online advertising, multimedia presentation and refer-a-friend)
- Alignment with our Channel Strategy
- Formalising word-of-mouth references
- Well targeted, low cost pilot opportunity
- Supports information on www.ato.gov.au
We got our cash back in 4 days with etax

How to actually get your Australian personal income tax return back within several working days!
A case study by the Australian Taxation Office

Aussie off ATO and Leave Hoges alone!

Global

Basic Info
Type: Common Interest - Current Events
Description: The Australian Tax Office is after one of Australia's living treasures, arguably Australia's greatest living treasure and ambassador, Paul Hogan. The man who brought us The Crocodile Dundee trilogy and the classic Crocodile Dundee in Los Angeles, not to mention the box office smash Strange Bedfellows, is under the pump from the tax office! Those flaming gaihans down at the ATO are trying to squeeze him for a bit more coin. Well I say hasn't hoges done enough for this country?

Enough is enough!

A wise man once said "Hoges has done a sterling service for this country and shouldn't have to pay a cent of tax in his life"

Members
Displaying 9 of 32 members

Officers
Matt Weightman
Supreme Intergalactic Overlord of Hogan
Steve Hunlin
The Hogan-Nazar
Aaron McCann
Extreme First Battlemaster de Hogan

Group Type
This is an open group. Anyone can join and invite others to join.

Admins

The Wall
Applications
Risk and stakeholder management – making it happen!

- Risk averse
- Early stakeholder engagement
- Risk management approach was critical
  - Wall posts
  - Fans
  - Disclaimer
  - Q&A
- Demonstrate potential for success through work examples
- Pilot
The Page: lodge your Australian tax return online using e-tax

- Page launched 14 July 2008
- Fans to date: approximately 270 and 10 wall posts
- More than 2,000 unique Page view since July
‘Push’ activities

- Countdown widget
- Update to fans (email feed)
Outcomes

- Target audience take-up: analysis of fans by age indicates 19-24 year old age group are the second highest demographic.
- Ratio of new fans to the people who left the Page.
Outcomes

- Positive testimonials – opportunity to develop campaign messaging
- No negative posts about e-tax
Recommendations for Tax Time 2009

- **Consider**: host a link on ato.gov.au taking viewers directly to the Page, plus graduate recruitment opportunities
- **Continue**: ensure the Page remains interactive with mitigation measures as appropriate
- **Retain**: refresh and reuse Page

The end