



Treasury Board of Canada  
Secrétariat

Secrétariat du Conseil du Trésor  
du Canada

Canada

# Shifting towards a task-based IA

## Our story

**World IA Day – Ottawa**  
February 18, 2017

# What is a task?

**Something a person “wants” to complete through services or information you offer.**



How do I file my taxes?



How many hours do I need for a PPL?



What do I need to start a business?

# Canada.ca task model

---



- Identified top 100 tasks offered by the Government of Canada
- Grouped them into themes and topics
- Created a Topic Tree
- Setup a weekly meeting with theme lead departments



Government  
of Canada

Gouvernement  
du Canada

[Jobs ▾](#)[Immigration ▾](#)[Travel ▾](#)[Business ▾](#)[Benefits ▾](#)[Health ▾](#)[Taxes ▾](#)[More services ▾](#)

Enjoy free admission to Parks Canada places in 2017



|| Pause

## Most requested services and information

Get quick, easy access to the Government of Canada's most requested services and information.

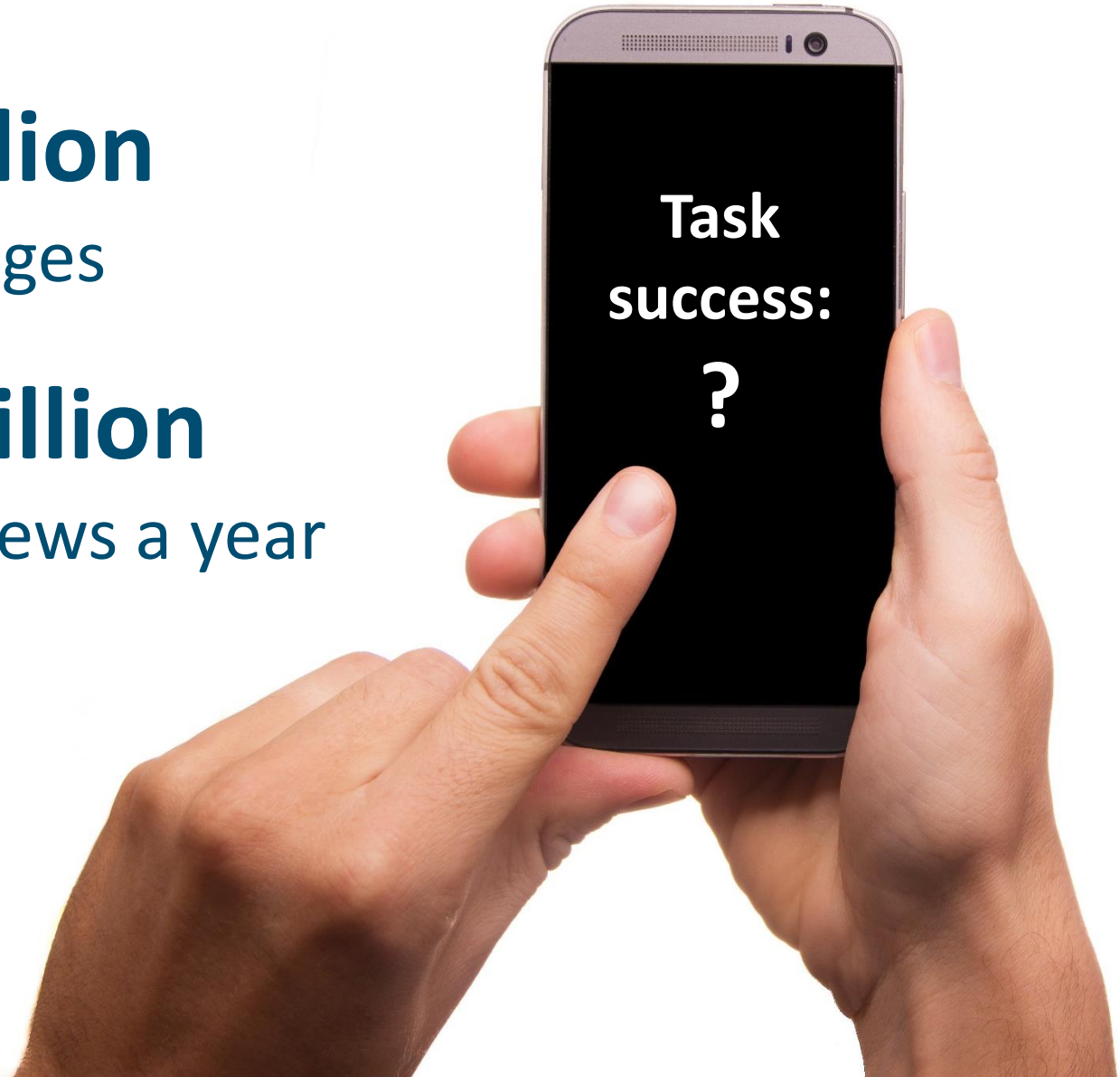
# The Challenge

**4 million**

web pages

**1.4 billion**

page views a year



# Our goals

---

## 1. Shift the mindset

- Publish less, and improve what we have
- Use the same layouts and IA for key pages
- Write content people will understand
- Bring evidence into every decision

# Our goals

---

## 2. Deliver improvements ASAP

- Why wait when we know something is going to help?
- Gain real-world metrics on findability and usability to help everyone improve
- Encourage others to follow



# Shifting the mindset





# Making a case for rules

Public Servants

**>250,000**

Delivering

**1000s services**

Need for

**Consistency**

Need for

**Plain language**

**For everyone's  
benefit**

**Start  
discussions**

Create

**Rules as content and IA tools**

# Typical rule-makers

---

**Out of touch**

**Insulated**

**Unreasonable**

**Unrealistic**

**Pretentious**

# Good rule-makers

---

**Humble**

**Prepared to be wrong**

**Trust the people who will  
use the rules**

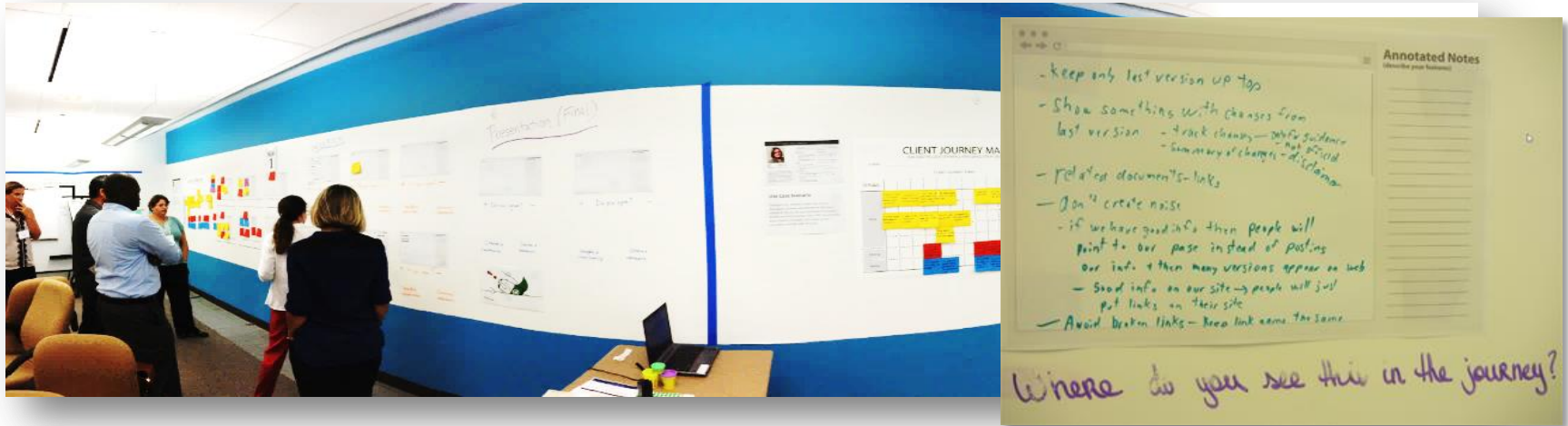
Attract outside  
talent

Collaborative

Continuously  
improve

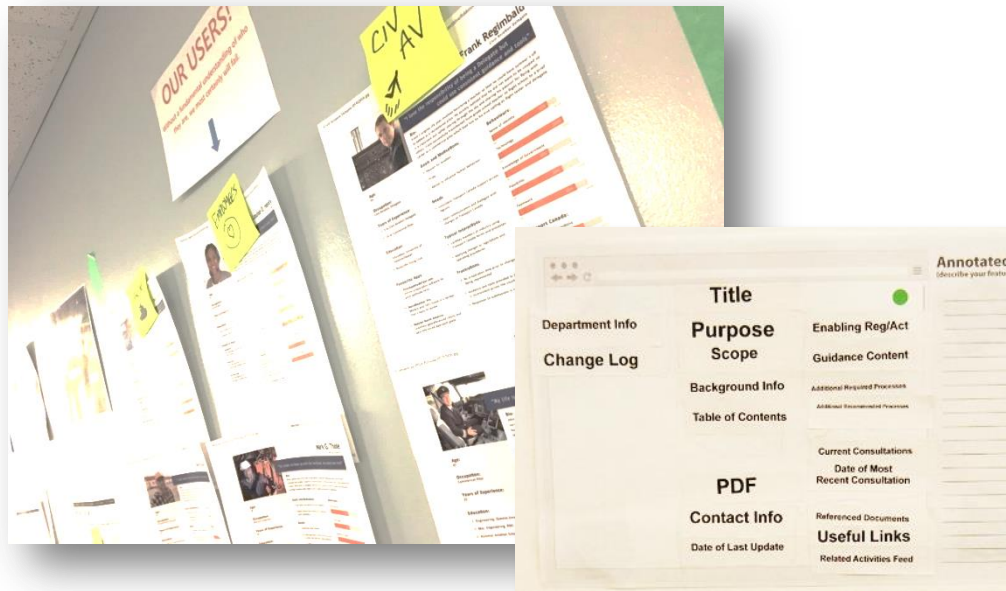
# Co-designed the rules

- We'd get the ball rolling on an approach
- Hand off to a skilled department or group
- Tested the approach
- Integrated it into rules (to everyone's benefit)



# Encourage experimentation

- Openly shared designs and IA approaches
- No one got in “trouble”
- Tested the approach
- Integrated it into rules (to everyone’s benefit)



# Examples of rules

## 2.9 Measure your content for readability

Writing for readability is important when developing content for Canada.ca.

To gauge readability, evaluate the reading level of content that supports your top tasks as follows:

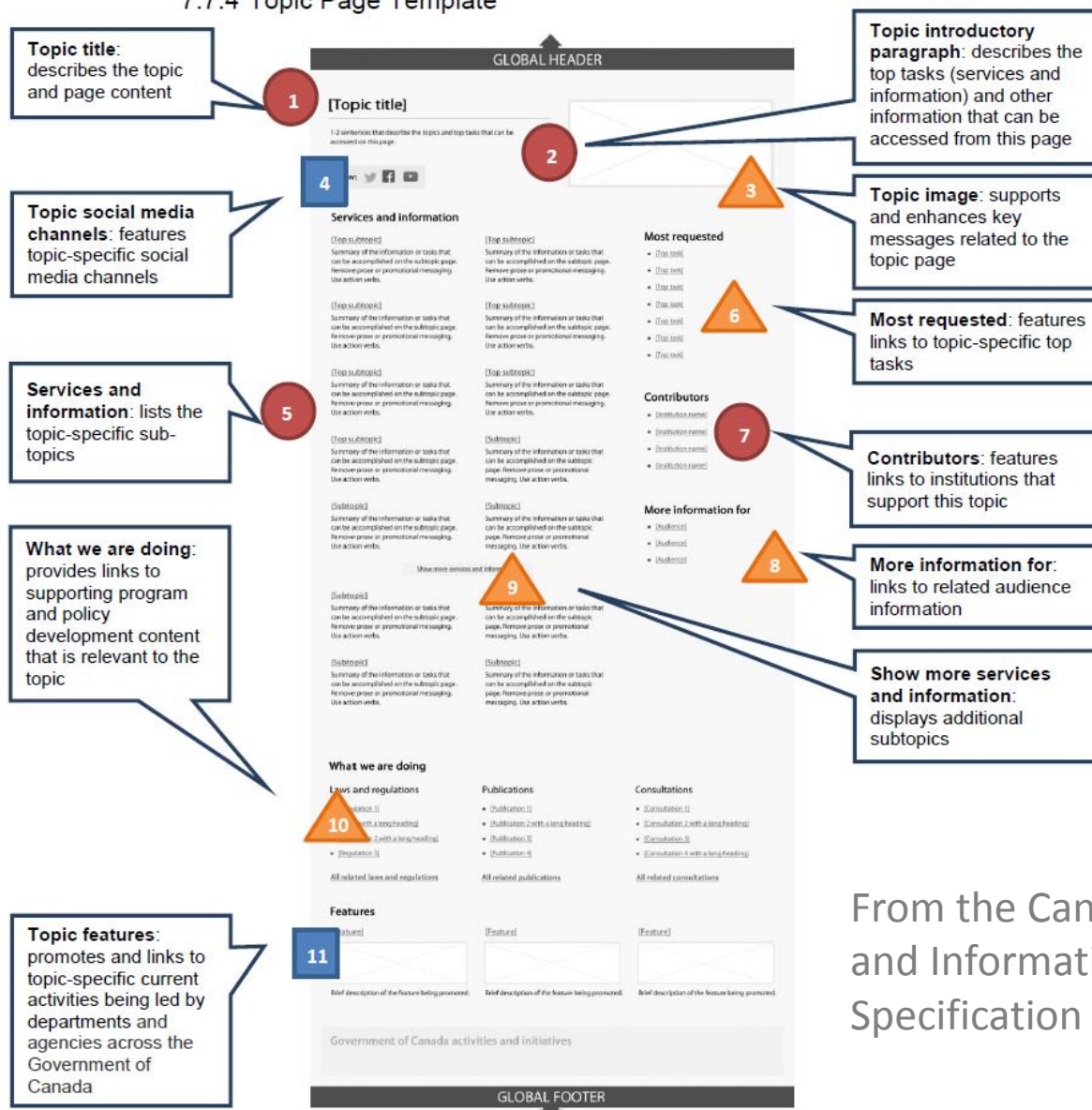
- navigation content (home, theme and topic pages), destination content and text appearing in web applications for general population audiences: target Grade 6 to 8
- specialist content, including web applications designed for specialist audiences: institutions must determine the appropriate grade level and apply this level across all content

To assess if your content meets the requirements for readability, you can use Word's free Flesch-Kincaid tool.

From the Canada.ca Content Style Guide v2.0

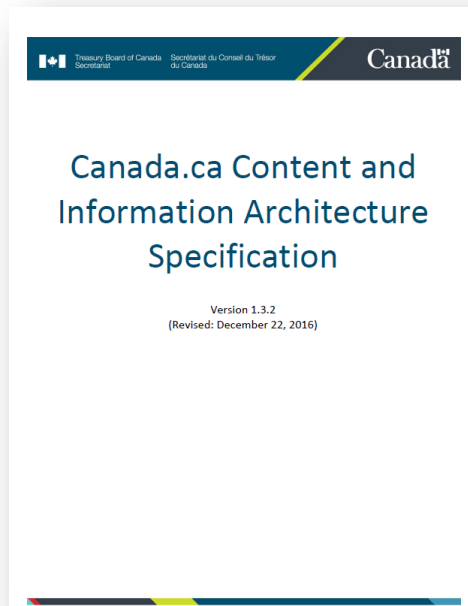
# Examples of rules

## 7.7.4 Topic Page Template

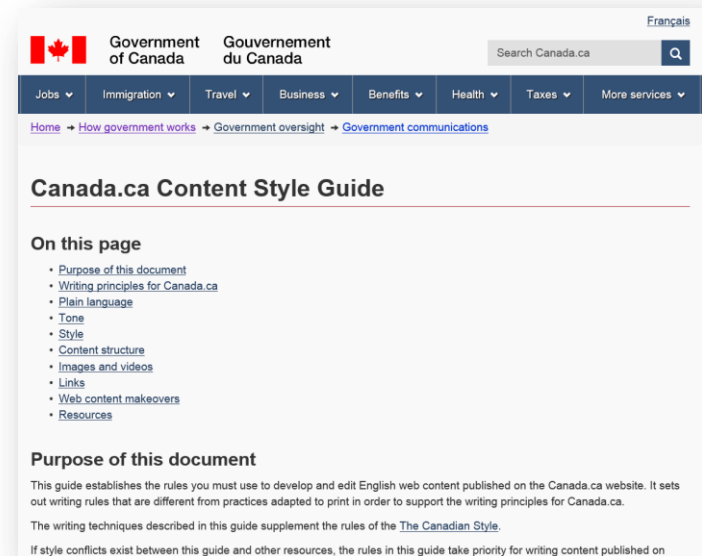


From the Canada.ca Content and Information Architecture Specification v1.3.2

# The result



Our design manual



Our style guide

- Rules for an entire enterprise can use as tools to improve their content
- A testing habit
- Mechanisms to continuously improve



# Delivering improvements

# Targeted pilots

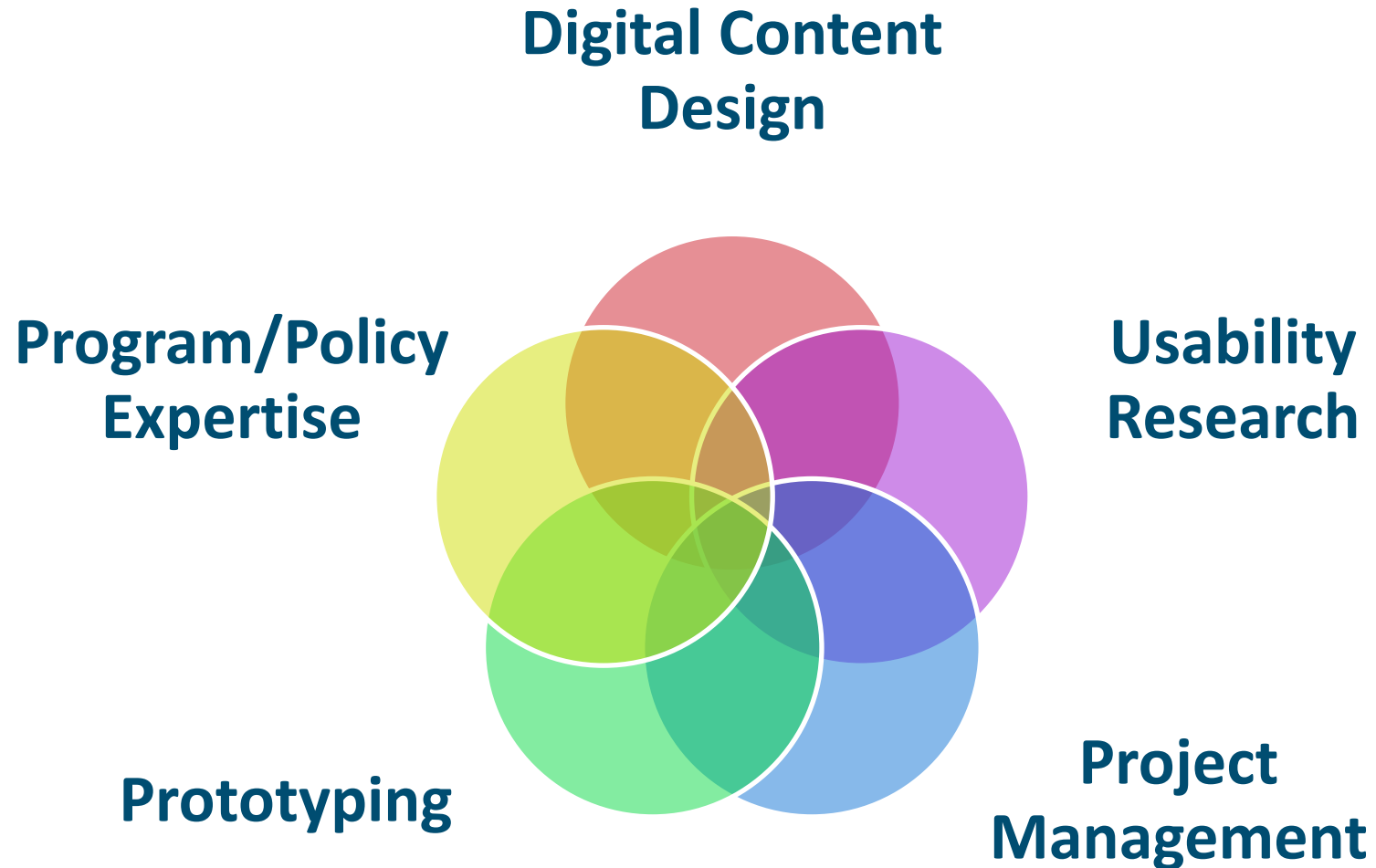
---

## Optimization projects: improving existing digital services for citizens

- Small teams working in a short timeframe
- Doing a single cycle of test-and-improve
- Focusing on specific aspects of high-demand online services
  - Typically the “getting started” tasks, like understanding eligibility criteria or meeting prerequisites
- Using processes derived from Design Sprints and Top Task Management
  - Starting from a baseline usability test
  - Measuring task findability, task completion and time on task

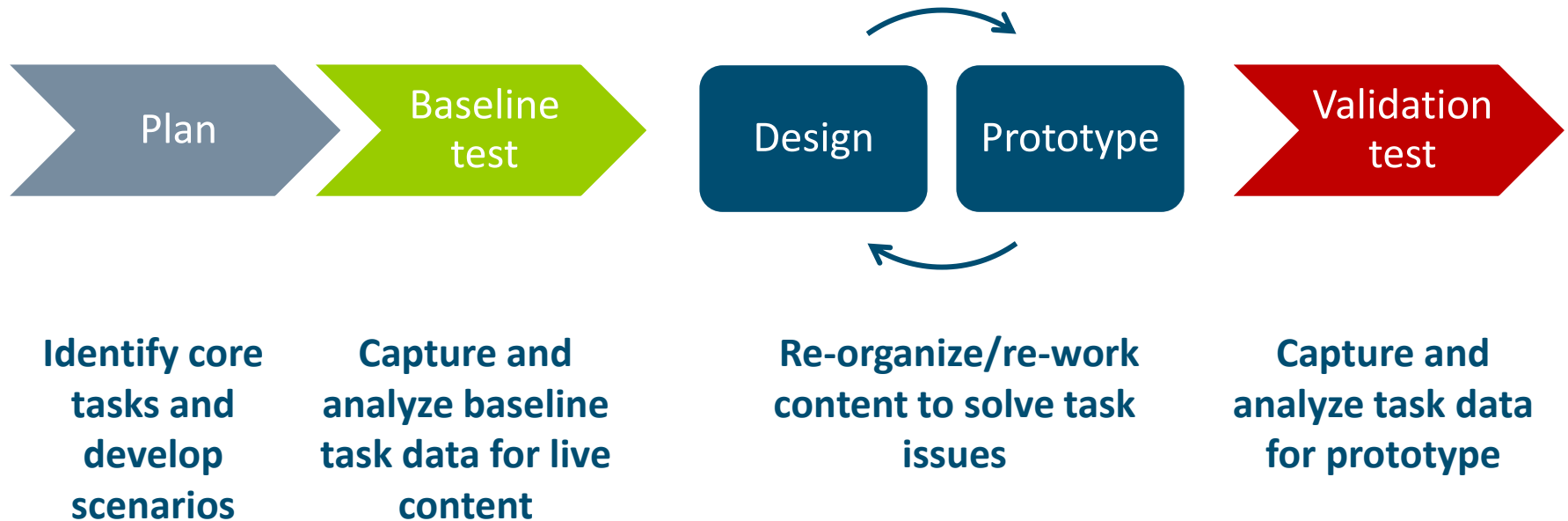
# The actors – multidisciplinary teams

---



# The Process

**Timeframe: 3-4 months**



# Case study – “Starting a business” pilot

## Minimal investment, solid return

- **Duration:** Oct 2016 – Jan 2017 (3.5 months)
- **Project team:** 9 team members from TBS, ISED and CRA
  - Plus 3 consultants to design & run tests, analyze data and recommend solutions
- **Optimization target:**
  - +15% task success and findability rates
  - Overall reduction in time-on-task
- **Product outcome:** prototypes ready for integration into production environment
  - Flatter IA structures,
  - Clearer and simpler content
  - Improved design patterns – adopting and extending TBS guidance

# Planning – task ID

Task Title	Scenario	Success Requirement
<b>1. Legal steps</b>	Imagine you are going to start a home business in Winnipeg, part-time as a consultant. Find out what you can find out about any essential legal steps in that process.	Find at least 1 essential legal step: register, choose a unique name, register for business number, incorporate, get permit
<b>2. Name your Business</b>	You want to name your new business 'SOMOS'. Check if it is legal or illegal for you to start using that name.	Use of name illegal - SOMOS already registered
<b>3. Incorporate</b>	You have decided to incorporate your business. Is it possible to submit the application form online, and if so, how much it will cost?	Yes - \$200 to file online
<b>4. Charge GST</b>	You expect to earn about \$1,000 a month from your new business for the first six months. Find out (yes or no) whether you must charge GST to your customers.	No
<b>5. GST Account</b>	Your business needs to start collecting GST. Find the official first step you must take.	Register for Business number and GST account - Register online button in English or French equivalent
<b>6. Pay employee</b>	Your first employee starts work next month. Find out (yes/no) if there is an official step you must take before or very soon after you cut their first paycheque.	Yes –register for a payroll account CRA

# Usability testing

## Combine new approaches with established methods

### Moderated

- Proven methodology for behavioural research
- Deep insights into issues with task findability and completion
- Expensive, difficult to scale

### Unmoderated, online

- Online testing tools rapidly evolving
- Promising for benchmarking, pilot testing
- Low cost, scalable

### “Starting a business” participants

- Business students (20s)
- Mature adults (40s, 50s)
- Most new to starting a business
- Baseline testing: n=12
- Validation testing: n=34

**Key consideration:** test design, analysis of data/evidence requires expertise

# Design/Prototyping

## The path of least resistance

### Aligned to GC toolset: GitHub

- Used for Web Experience Toolkit
- Outputs HTML, easy integration into production environments – or other prototypes
- Manageable learning curve

### Collapsed traditional silos between content, design and coding, via:

- Weekly design meetings
- Working in pairs

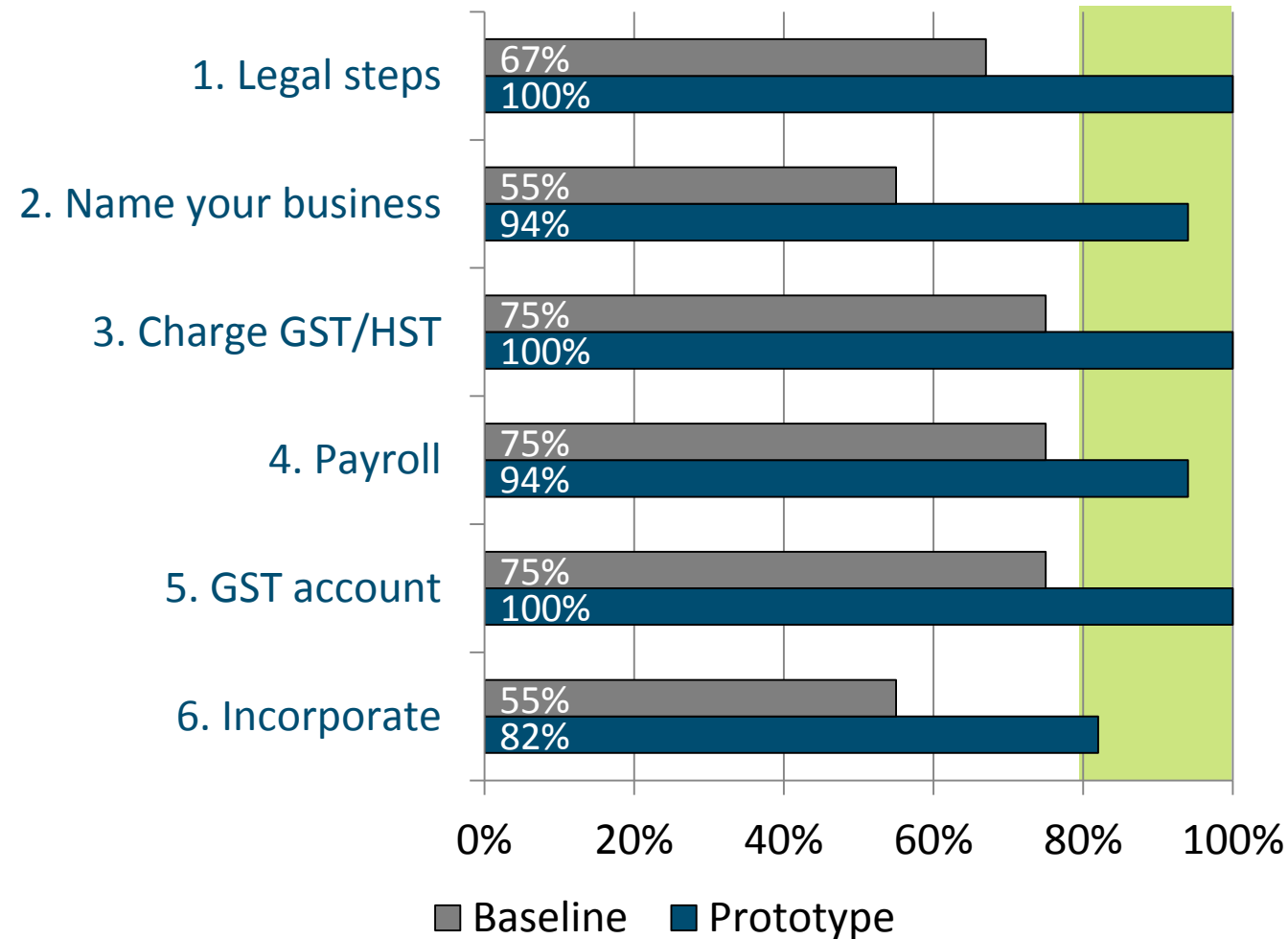
### “Starting a business” prototyping

- 58 pages
- 8 contributors
- 600+ edits

- Nearly all team members contributed “commits”
- Most had never used GitHub before



# Task findability – before and after



**Q +28%**

Improved  
**Task Findability**  
rate



# Example – step-by-step pattern


## Before – topic page pattern

Home → Taxes

### GST/HST

Register an account, collect, file, and remit the GST/HST

Follow:  



#### Services and information

<b>GST/HST overview</b> What is GST/HST, who pays, who charges, and what is taxable or not	<b>GST/HST accounts</b> Who should register, how to register, make changes, or close a GST/HST account
<b>Charge or collect GST/HST</b> When and how to charge, what rate to charge, and invoicing requirements	<b>GST/HST returns</b> Complete a GST/HST return, file a return, or make changes to a return
<b>GST/HST payments</b> When and how to pay, and instalments	<b>GST/HST registry</b> Confirming a GST/HST account number
<b>GST/HST credit (individuals)</b> Payment dates, eligibility, and how to calculate	<b>GST/HST rebates</b> Different rebates available, including housing, charging GST/HST in error, and FCTIP

#### What we are doing

<b>Laws and regulations</b> <ul style="list-style-type: none"><li>First Nations Goods and Services Tax Act</li><li>Excise Tax Act</li></ul>	<b>Publications</b> <ul style="list-style-type: none"><li>BC4058 - Quick method of accounting for GST/HST</li><li>BC4026 - GST/HST New housing rebate</li></ul>	<b>Forms</b> <ul style="list-style-type: none"><li>GST191 - GST/HST application for owner</li><li>GST66 - Application</li></ul>
---	---	---

## After – vertical steps pattern with action-oriented links

### GST/HST

Charge and pay the Goods and Services Tax (GST) and the Harmonized Sales Tax (HST).

#### Steps for charging

1. [Find out if you need to charge GST/HST](#)

Answer a few questions to find out if you need to charge the tax.

2. [Get a GST/HST number](#)

Register and get your GST/HST number to file taxes.

3. [Charge the GST/HST](#)

What rate to charge, receipts and invoices and what to do with the tax you collect.

4. [Complete and file a return](#)

Find out how to calculate your net tax, complete a return, file and make changes to a return.

5. [Send your GST/HST payment](#)

Find out when and how to remit the tax, including paying by instalments.

#### Other services and information

[Claim a GST/HST rebate](#)

All rebates you may be able to claim on the tax, including new housing, charging the tax in error and visitors with tours or conferences.

[Close your business tax accounts](#)

Close a GST/HST account and other tax accounts if your business is being closed.

[Modify your GST/HST account details](#)

Change your business details, including address, contact information, fiscal year, and accounting and reporting period.

[Apply for a GST/HST credit](#)

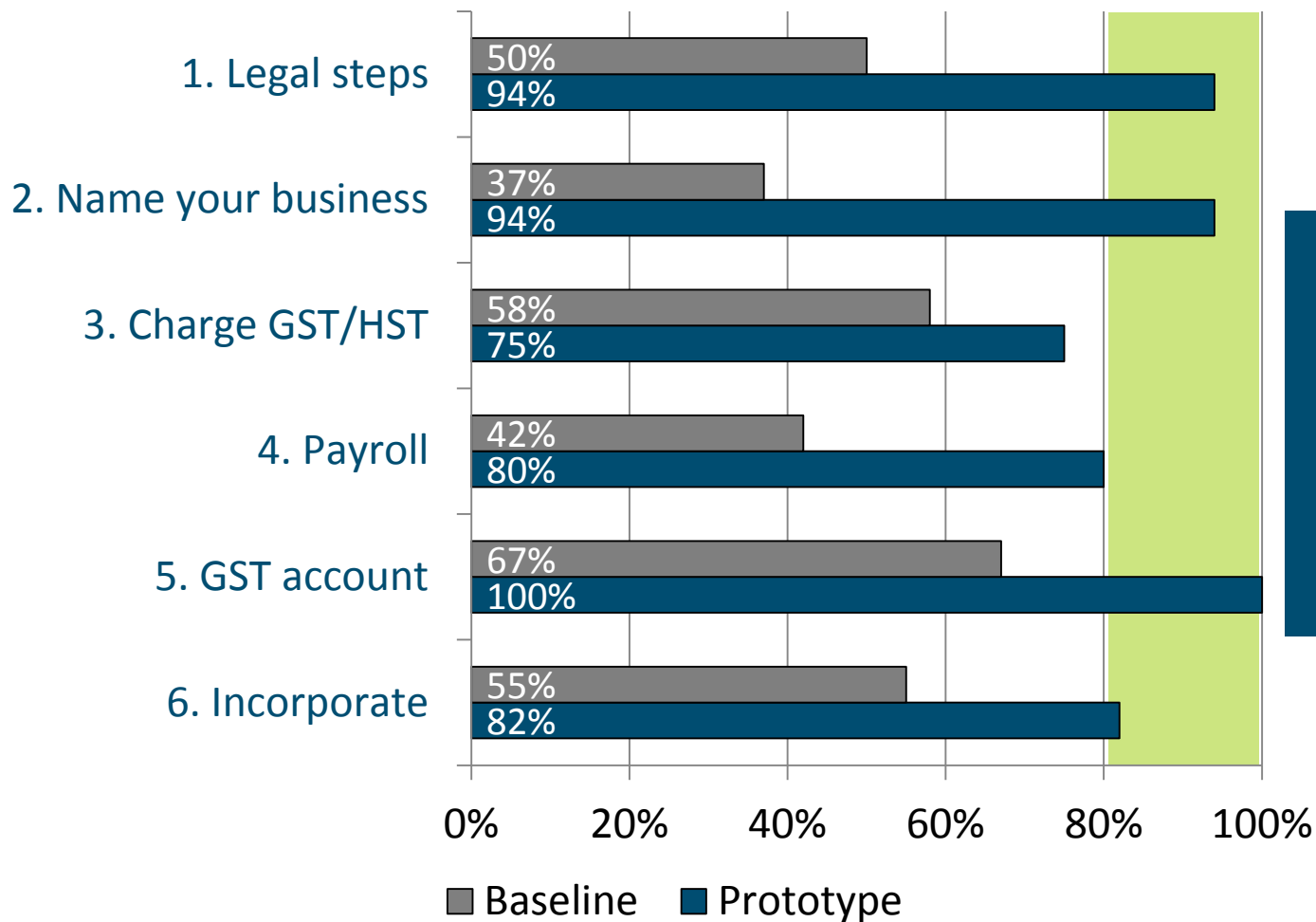
Find out if you can apply, payment dates, and how to calculate.

#### Most requested

- [Check if a business is registered to charge GST/HST](#)
- [GST/HST NETFILE](#)
- [GST/HST and specific sectors](#)
- [Input tax credits](#)
- [GST/HST and place of supply rules](#)
- [GST/HST Return Working Copy](#)

Action oriented links (Get a GST/HST number) were much more effective than noun oriented links (GST/HST accounts)

# Task success – before and after



✓ **+35%**

Improved  
Task Completion  
rate

# Example – question-and-answer patterns

After – series of Qs & As, aka “Wizard”

Before –  
Long page  
with tables  
to explain  
requirements

[Home](#) → [Taxes](#) → [GST/HST](#)

## Find out if you need to charge GST/HST

Answer a few questions to find out if you need to charge or collect the tax and register to get a GST/HST account number.

Businesses with lower revenue and those that deal in certain goods and services might not need to charge the tax.

Do you or your organisation already have a GST/HST account?

- ☐ Yes
- ☒ No

Next

(Max. of 4 more plain language questions)

## Find out if you need to charge GST/HST

Answer a few questions to find out if you need to charge or collect the tax and register to get a GST/HST account number.

Businesses with lower revenue and those that deal in certain goods and services might not need to charge the tax.

Your answer:

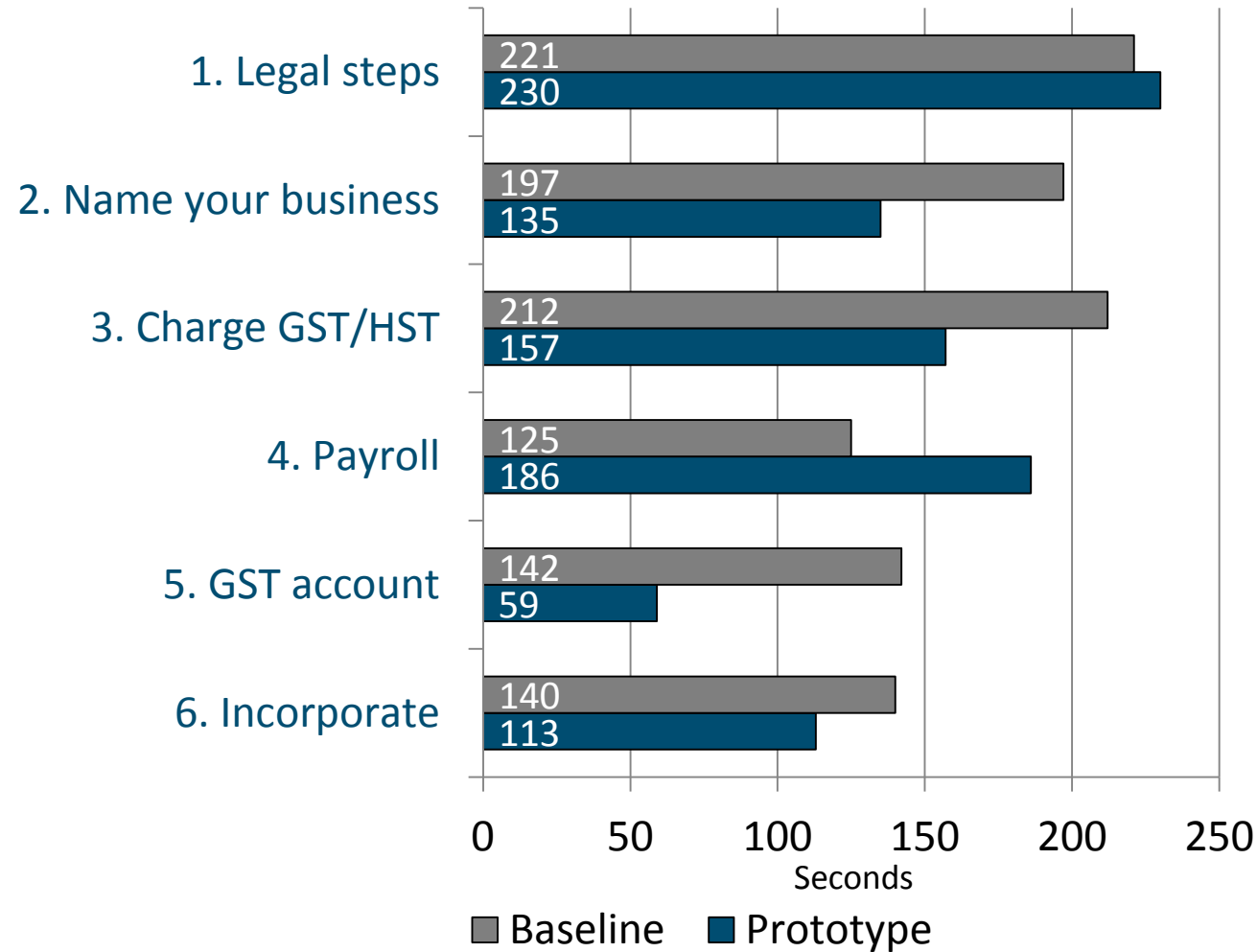
You do not have to charge or register for the GST/HST.

- Your answers suggest you are a small supplier. Your revenue from taxable supplies is less than \$30,000 CAD over 4 calendar quarters.
- You should make this calculation every January 1st, April 1st, July 1st and October 1st to find out if your status has changed.
- You may choose to [voluntarily register for the GST/HST](#). If you have a GST/HST account, you must charge the GST/HST on taxable supplies.

Back

Next

# Time on task – before and after



**-15%**

Reduced  
Time on Task

# Targeted pilots - learnings

---

## Pilots as nudges

- Behavioural evidence drives optimization
- Optimization can be achieved without massive investments
- Real-world test of design patterns → evolving the guidance

## Multidisciplinary collaboration

- Quick and effective decision making, grounded in evidence
- Facilitated by working together on prototypes

## Digital design

- Small-scale changes can result in big improvements
- Powerful patterns: Step-by-step, question-and-answer
- Clear and simple language is key

# The Takeaways

---



Document rules and treat them as tools

---



Collaboration pays dividends

---



Choose words people understand,  
and display them in ways they expect.

---



Fix what people care about to  
drive improvements.

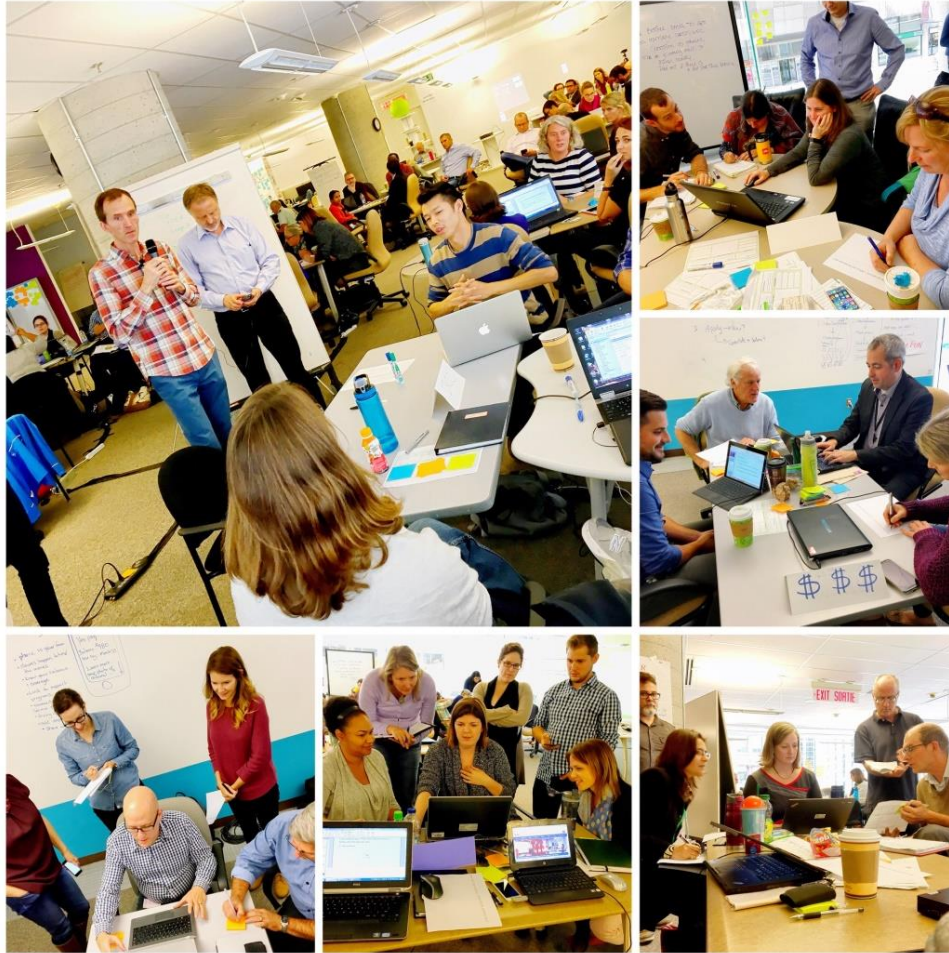
---



Evidence matters



# We're just getting started...



- Expand this approach to optimize **more** and **more** and **more** top tasks
- Continue to nudge teams to **look to the people** outside their buildings





# Thank you

**Manu Singh**

 @singhav8r

**Peter Smith**

 @ pcwsmith