**2019 ATDKC Excellence in Practice Awards**

**Category: Learning and Development**

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| **H&R Block’s Tax Law Changes Program** |
| **Challenge:**  |
| Emerging tax law changes in 2018 presented a significant business and training challenge for H&R Block. How do you prepare a global workforce of 80,000 tax professional on a moving target? Between the time the IRS issued early clarifications and the IRS opening day, there was a five-month window to create and deliver the training. Without an industry SME, we had to become THE experts before delivering the training. Failing to ramp up our workforce was not an option, as a lack of expertise in the field can lead to a loss in market share. |
| **Action:**  |
| We established a blended learning approach. A virtual course designed to: * Be delivered early and without case studies (pre-software development)
* Provide live instruction with the opportunity for Q and A
* Ensure maximum seat capacity and an easy way to add offerings based on demand
* Cover a wide variety of topics covered in various scenarios using breakout sessions
* Introduce the most complex topic, known as the Qualified Business Income Deduction

An ILT blended offering designed to: * Be self-guided and leader-led
* Provide training in the client experience, client interview, and soft skills training
* Provide tools and resources to be used at the tax desk

An online course designed to: * Focus only on the new and most complex legislation - Qualified Business Income Deduction
* Provide latest information from the IRS including forms and instructions
* Include Case Studies using our proprietary software
* Provide unlimited capacity for participants
* Be delivered ‘just in time’ for tax season – delivered January 7th

Each course offered something the others did not so people who took all three would experience three courses that complimented each other. The courses strategically incorporated various elements of instructional design including: * Breakout sessions
* Interactive activities for self-studies
* Instructor guidance
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| **Result:**  |
| The value to the industry and the performance outcomes for the organization will not be known until more of the tax season is completed. We are days away from the fully-functional IRS e-file acceptance. * The virtual course experienced a record number of enrollees; up by more than 150% of the previous record.
* 97.6% of hired tax professionals successfully completed the blended offering prior to the IRS opening day.
* The online course launched on January 7th and will be available throughout 2019. In the first three weeks, over 9,000 associates had successfully completed the course.
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