CIOT President's page: A year for progress

Welcomes



24 January 2025

A good New Year to all – and as I look forward to 2025, I would like to share some forthcoming highlights in the CIOT member events calendar.

HMRC has an anniversary this year as it is 20 years since it came into existence, having previously been two very different departments – the Inland Revenue and Customs & Excise. Much has changed with steps to unify culture and tax administration, self-assessing of taxes, and a more digital world – and no doubt there will be further significant changes over the next20 years. The CIOT and ICAEW are hosting a conference, ‘20 years of HMRC: Reflections and looking ahead’ on 11March with a combination of keynote speakers and panel sessions. Do attend if you can.

Other dates to book include 23 and 24 April for the online Spring Conference, which is offering a range of technical updates on corporate compliance and advisory work (23 April) and advising personal clients (24 April). You can book for both mornings or

a single morning.

This year’s Cambridge Conference is on 19 to 21 September and aims to be a ‘one stop shop’ for anyone in practice. I very much enjoyed last year’s conference and recommend it for the opportunity to network with fellow practitioners, take time away from your client work and consider your practice in the round, as well as benefiting from the best of speakers. I’ll be attending again this year.

The use of artificial intelligence in tax has been high on the priority list in 2024 and this continues into 2025; technology increasingly sits at the heart of our work practices and in HMRC. As well as the refreshed Diploma in Tax Technology, there is a recently launched introductory eight-hour self-study AI course. Both are designed to give members understanding and confidence in the use of tax technology, and an awareness of risk management in tax AI. The Institute is also hosting a one-day Tax Technology Conference in Birmingham on 4 June.

Don’t forget to use and support the branch network and do get in touch if you think more, or different, offerings should be in place.

I am very conscious that last year the CIOT technical team and office bearers continued to receive feedback from members about HMRC’s services. Member anecdotes presented a picture of long waits, poor quality and inconsistent advice, and a basic inability (especially for agents) to do things online driving them back to having to use the helplines. A key discussion in-house, and with counterparts in ICAEW, looked at what exactly gives rise to the problems and what might be done to address them.

With this in mind, a number of firms agreed to log all their interactions with HMRC over a six-week period. I’d like to thank the 31 firms that participated in this data-gathering exercise – completing a log for every phone call or webchat about the purpose of their contact, the length of time involved and the outcome.

There is a fuller discussion of ‘Tackling HMRC’s customer service challenge’, issued in December 2024, but for me the most telling finding is the amount of contact generated due to the need to chase progress. Over a third of all calls are to ask, for instance, when a letter will be replied to or where the repayment is. I’m most grateful to HMRC for joining a panel to discuss both the report findings and the 10 recommendations put forward. HMRC is well aware that progress chasing is an issue and that addressing this, and more generally customer service, is a ministerial

priority for the Exchequer Secretary to the Treasury. It will also remain a priority in the CIOT so please continue to provide feedback on HMRC service – whether it is ‘good’, ‘getting better’ or otherwise throughout 2025.

CIOT members are served by a fantastic team of staff and they will continue to help shape and influence the future of tax administration in the interests of taxpayers and the wider public. This is greatly enriched when their work is informed by members’ experience and knowledge. Do keep in touch and I’ll look forward to meeting with you at CIOT events this coming year.