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| Inland Revenue |
| Business Transformation Programme  Lean Business Case  <<opportunity/change name>>  **Business Sponsor:**  **Product Owner:**  **Initiative Lead:**  **Prepared by:**  **Date:**  **Document Signoff**   |  |  |  |  | | --- | --- | --- | --- | | **Review Area** | **Name** | **Signature** | **Date** | |  |  |  |  | |  |  |  |  | |  |  |  |  | |  |  |  |  | |
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# PROBLEM DESCRIPTION

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| Problem Statement |
| *“What problem are we addressing?” “What is the impact of this problem – for whom?”* |

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| Problem Context |
| *What is the purpose for making a decision, why are we doing it, what do we want to achieve, why now and what is the perspective (assumptions, view point) of how the team have approached the decision, what conversations are required and with whom.* |

# OPPORTUNITY DESCRIPTION

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| Opportunity Hypothesis |
| *Description of the opportunity, how does it work, what value does it provide, how does that value compare to today.*  *What makes this better than today, why is this change necessary, how does this candidate align with the Strategic Drivers.*   1. *Improving data quality across the ecosystem* 2. *Upping our game in how we apply analytics* 3. *Understanding and proactively responding to the emergent customer interaction model* 4. *Continue driving towards make compliance easier for our SME and micro customers* 5. *Build the people capability needed to support our new multi-channel interaction model and leverage the transformation enablers that are now in place.* |

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| Leading Indicators |
| * *What do we know of today that reflects the problem, its scale, and the outcomes the organisation is seeking?* * *What are the measures that will help predict the business and/or customer outcome hypothesis?* |

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| Business Outcome Hypothesis | Customer Outcome Hypothesis |
| * *What are the measurable benefits the business can expect if the Opportunity Hypothesis is correct?* | * *What are the measurable benefits the customer can expect if the Opportunity Hypothesis is correct? (This could be additional or relieved customer cost/effort required to meet tax obligations and/or seek entitlements)* |

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| Timing considerations |
| *Are there any legislation dates, natural business rhythms or other timing constraints e.g. platform end of life, concurrent initiatives, dependencies, sequencing etc driving when this initiative should be delivered by.*  *Consider if the delivery could be broken up into smaller pieces to deliver value earlier.* |

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| Customers | |
| *A description of the customers using or affected by this service and* | % of \_\_\_\_\_ users/customer |
| *Approximate size of the impacted customer group* |
| Activity | |
| *The activity or service the customer group is utilising* | % of \_\_\_\_ actions |
| *Approximate size of the activity/ effort* |

For each of the categories below please specify whether the saving/s identified are **Realisable** (eventuate in a direct cost reduction against any operating budget?) OR Non-Realisable (Will not directly result in a change to any operating budget?)

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| Annual Operational Cost Savings | Annual Customer Compliance Savings (Cost/Effort) |
| * *Assess the approximate value contribution of implementing the change.* * *Time to realise - the point that value can be realised (i.e. immediate, <1 month, <3 months, <6 months, 6+ months).* | * *Assess the approximate value contribution of implementing the change.* * *Time to realise - the point that value can be realised (i.e. immediate, <1 month, <3 months, <6 months, 6+ months)* |

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| Revenue Savings |
| *Is there expected to be a direct impact to and/or additional Crown Revenue?*  *This can be considered in one of the following two ways:*   * *Money In: Revenue gained by IR if this change is made.* * *Money Out: Entitlements gained by IR's customers if this change is made.*   *Assessment would be against the value IR would receive and time it takes for IR to realise the value (i.e. immediate, <1 month, <3 months, <6 months, 6+ months).* |

*This section of the Lean Business Case and additional detail required above is generally completed after Senior Leadership have endorsed the initiative*

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# SCOPE

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| In Scope | Out of Scope |
| * *(Feature or Capability)* | * *(Feature or Capability)* |
| Minimum Viable Product (MVP) Features | Additional Potential Features |
| * *(Feature or Capability)* * *Must have functionality* * **…** | * *(Feature or Capability)* * *Should/Could have functionality* * **…** |

# DELIVERY CONSIDERATIONS

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| High level estimated effort |
| *T-Shirt size of effort for the main delivery components of*   * *Design, Development and Testing, and* * *Change Management Comm’s, Marketing, Training, Org Change, Stakeholder Management)* * *Delivery Management & governance* |

# OTHER CONSIDERATIONS

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| Other considerations |
| *Are there any other considerations which should be considered in the evaluation of this of this initiative? For example:*   * *Impact on customers or operations if not done.* |

# FOR REFERENCE

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| EFFORT  (T-SHIRT SIZING) | | DEVELOP | TEST | OCM&T | OTHER  (e.g. DES) | Impact |
| Significant | XXL | >100 | >100 | >100 | >100 | High |
| Extra Large | XL | 31-100 | 31-100 | 31-100 | 31-100 | High |
| Large | L | 16-30 | 16-30 | 16-30 | 16-30 | High |
| Medium |
| Medium | M | 6-15 | 6-15 | 6-15 | 6-15 | Medium |
| Low |
| Small | S | 2-5 | 2-5 | 2-5 | 2-5 | Low |
| Tiny | T | <1 | <1 | <1 | <1 | No change |