Inland Revenue
Te Tari Taake

Business Transformation

Website Rebuild Project -Coexistence and Transition Strategy

14 November 2018

Introduction

Purpose and outcome

- *At the end of the session the TEWC will understand the benefits of adopting this approach over others and the principles and processes guiding the coexistence strategy.*

- *The TEWC is asked to consider and endorse the coexistence strategy being proposed to use a Beta driven co-existence approach*

## The Web Rebuild Project recommends the TEWC

- *Endorse the recommended coexistence approach of Beta driven co-existence for R3 and beyond.*

- *Note the release strategy for each Beta drop and R3 go live as detailed in the addendum*

- *Note the approach for arriving at the right content*

- *Note the mitigation strategies for managing the risks related to the www rebuild*

Contents

— **rollout strategies**

Three options we explored
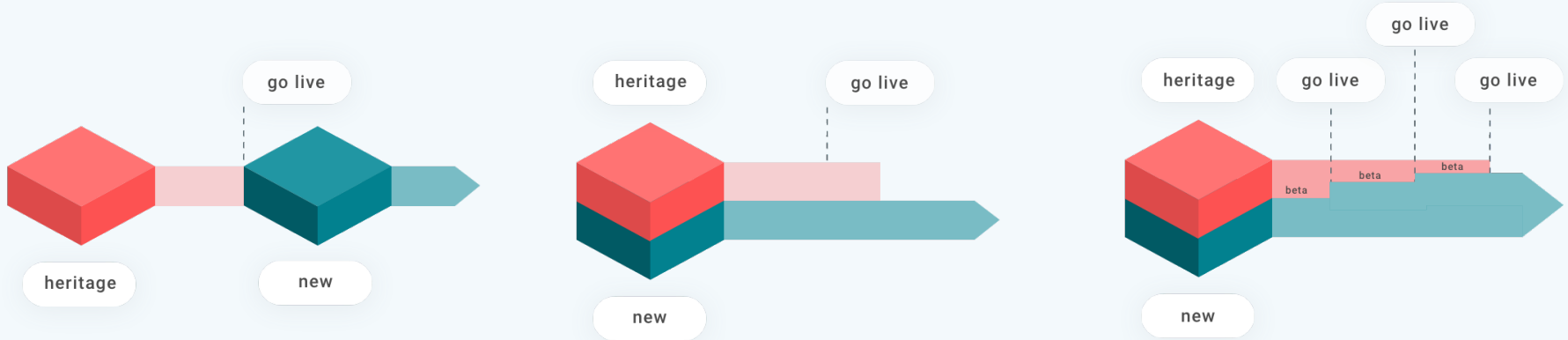
Single release approach

Single release of a complete new website late 2019. R3 product content on heritage website rewritten for April as with R1 and R2. New site released prior to R4 and old site decommissioned.

Side by side approach

New site launched in April 2019 with R3 products and R3 product on heritage site also rewritten for April. Two sites live side by side with incremental releases on new site until full product coverage reached before R4. Heritage site then discontinued when new site is complete.

Beta driven co-existence approach

Beta used to test and perfect blocks of content prior to incremental series of releases. Co-existence model with one site containing clearly delineated mix of old content and new. Unified navigation and search over old and new content.

Recommended

— rollout strategies

Beta driven co-existence

> Recommended

1 All content for each incremental drop decided through top-down (core user task) and bottom-up (inventory and user stats) analysis.

2 Design and content for each content block driven by customer requirements and co-design processes as well as an understanding of our obligations to inform.

3 Clear messaging on the purpose of the Beta, means users understand it is a test site until Beta content is promoted to co-existence site.
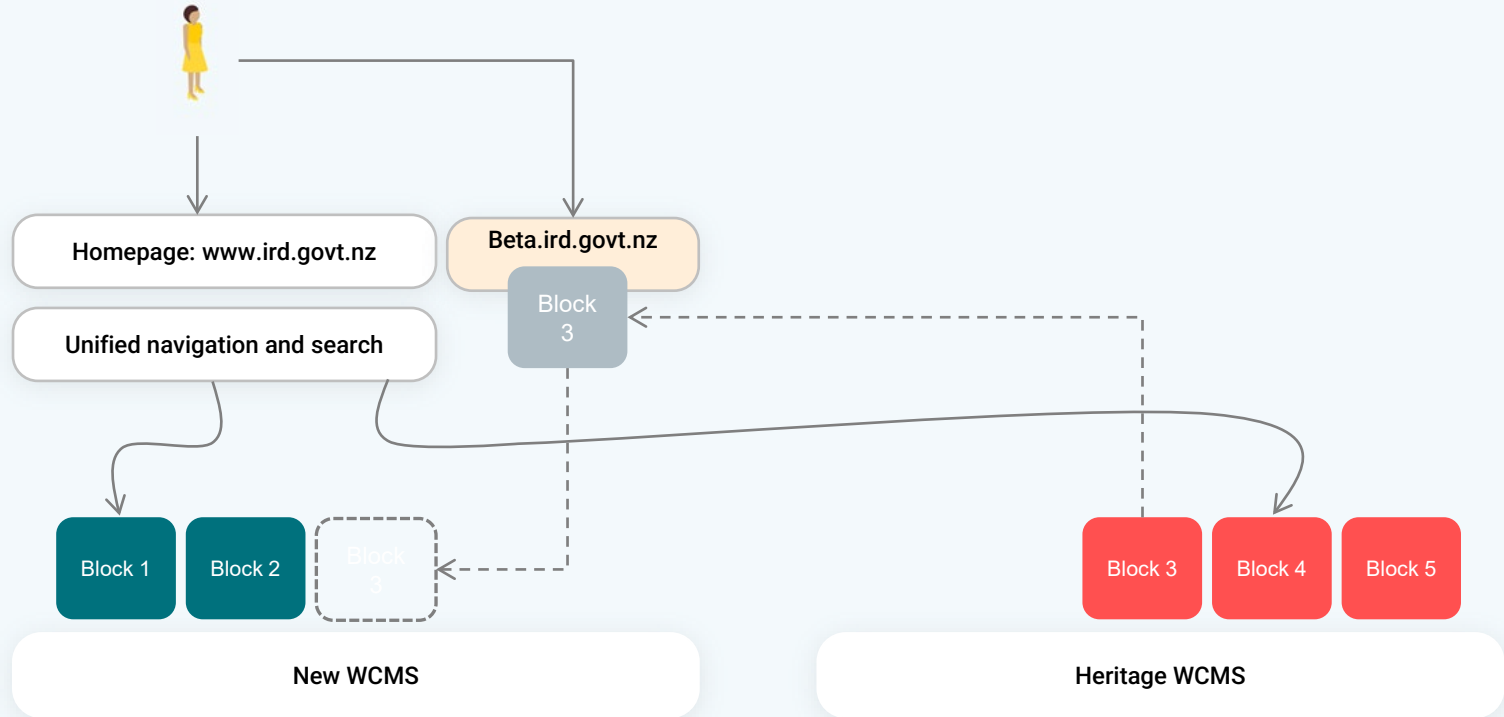
4 Beta site used as a testing ground to gather feedback, optimise design and promote the new content prior to each incremental release.

go live   go live   go live

beta   beta   beta

Fastest and surest path to value for our customers
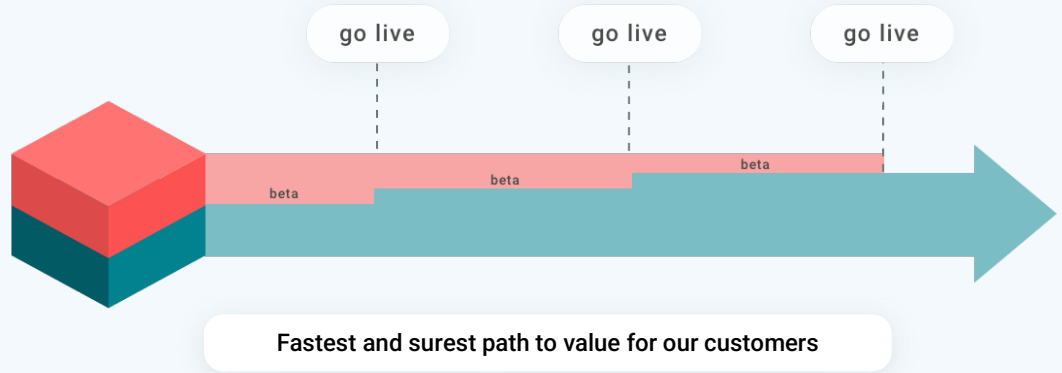
— rollout strategies

Content block migration and co-existence
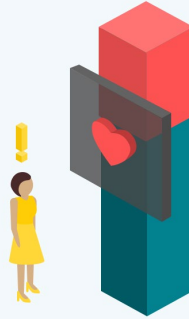
— **managing risk**
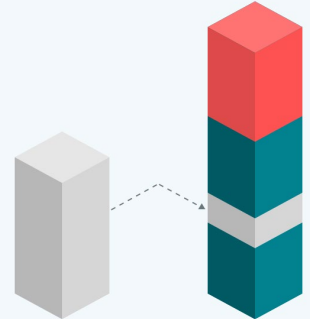
Guiding principles

| Single source of truth: 100% user need | Support findability | Robust monitoring | Easy augment |

— **managing risk**

Guiding principles

Single source of truth from R3

We will have a single source of truth from April 2019 - after go live there should be no period of time when R3 content topics are concurrently live on heritage and new.

Aim for 100% user need

We will deliver 100% of user need, using top down (user research)/bottom up (analytics) approach drawing on what we know from heritage and supplementing it with a robust process to ensure there no content gaps.

Test, monitor & iterate

We will use the time between now and April 2019 to test, monitor and iterate content and technology with our users to ensure as smooth a transition as possible at go live.

Support findability

We will support findability through implementation of a global navigation structure which signposts users to the right content whether hosted on heritage or new and a consistent search experience through the implementation of the [Information redacted] native search tool from April 2019.

Align user experience

We will align the user experience on tools and guides wherever possible to do so.

Management within a single system

We will migrate all relevant PDFs of forms and guides related to R3 to the [Information redacted] platform to ensure management from within a single system.

— **managing risk**

Content selection process

The following guidelines have been developed to aid the decision of which pages will be provided for the new website:

- Nothing with less than 250 views in the last two years unless analysis shows this relates to a small number of high impact users or the content is identified as being needed through top-down analysis

- Low/zero traffic content will be held in a repository on the new platform so it can be easily and quickly accessed and modified for inclusion in the new should the need arise

- No URLs which relate to automatically generated content such as index, cover and folder pages

- No duplicate content pages

- No pages which relate to events or campaigns in the past

— **managing risk**

Arriving at the right content for R3

Tax technical data will not be migrated for R3. A separate workstream is underway to create a solution that meets the requirements of the users of tax technical data. (~8,000 pages)

Low use pages (less than 250 views per annum) will be moved into a local repository if they're not required to support a top-down scenario of use. (~100 pages)

Elimination of pages that are duplicates, automatically generated content such as index, cover and folder pages, as well as all pages relating to events or campaigns in the past (~5,500 pages)

Content from the remaining pages is being rewritten to accommodate for the cater for top-down customer requirements and core tasks (~400 pages)

8,000 tax technical

5,498 pages archived

heritage

8,000 tax technical

106 moved into repository

400 pages

new

10

— **managing risk**

Content design process

This process has been elaborated based on the business goal of designing customer centric services which meet user needs and organisational objectives:

- Start with user research - identify the top tasks and pain points to prioritise the highest impact content on the heritage site.

- Study the analytics - bottom up analysis of traffic volumes to align with above.

- Align existing pages on heritage with the proposed new information architecture, to account for all existing pages on heritage.

- Reflect i-iii with user stories/tasks in the backlog.

- Collate a set of links from heritage which we do not propose to replicate on www rebuild.

- Consult with the business - engage product owners, segment leads, Technical Advisors and SMEs to validate approach and sign off content which is both in and out.

- Test with users - content will be prototyped, tested and refined throughout development with customers.

- Launch Beta content - publish content on the Beta, monitor traffic, contact centre calls and survey feedback to iterate and improve the UX.

- Measure performance against key business metrics and goals (satisfaction, effort and sentiment).

— **managing risk**

Plugging any content gaps

The following measures will be taken, should it become apparent that content has been missed in the transition from heritage to new which is considered of high enough importance to any of our customer groups to warrant reinstating:

Test and evaluation phase Pre April

- Customers will be encouraged to complete our feedback form and contact centres will be primed to field any calls relating to the content held on Beta.

- As with Beta 1.0, staff will be encouraged to contact the team via email to ensure we can quickly respond to any queries or concerns they may have.

Go Live Post April

- Heritage will remove/delete all INC, WFF and CS content from go live.

- Heightened awareness in contact center to flag any call patterns relating to content which may have been missed in the transition so that, if deemed necessary, remedial action can quickly be taken.

- We will implement an online form which will allow users to alert us of any content they are seeking but have not been able to find.
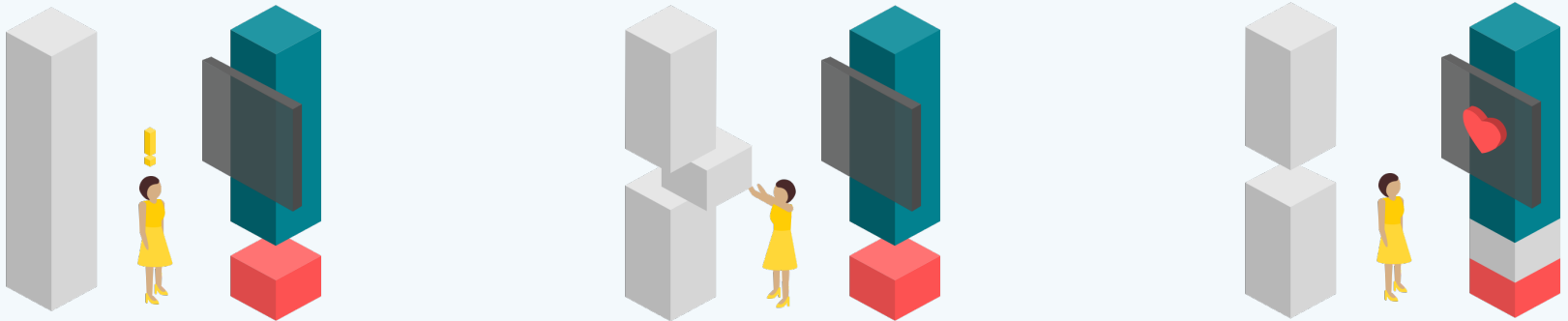
— managing risk

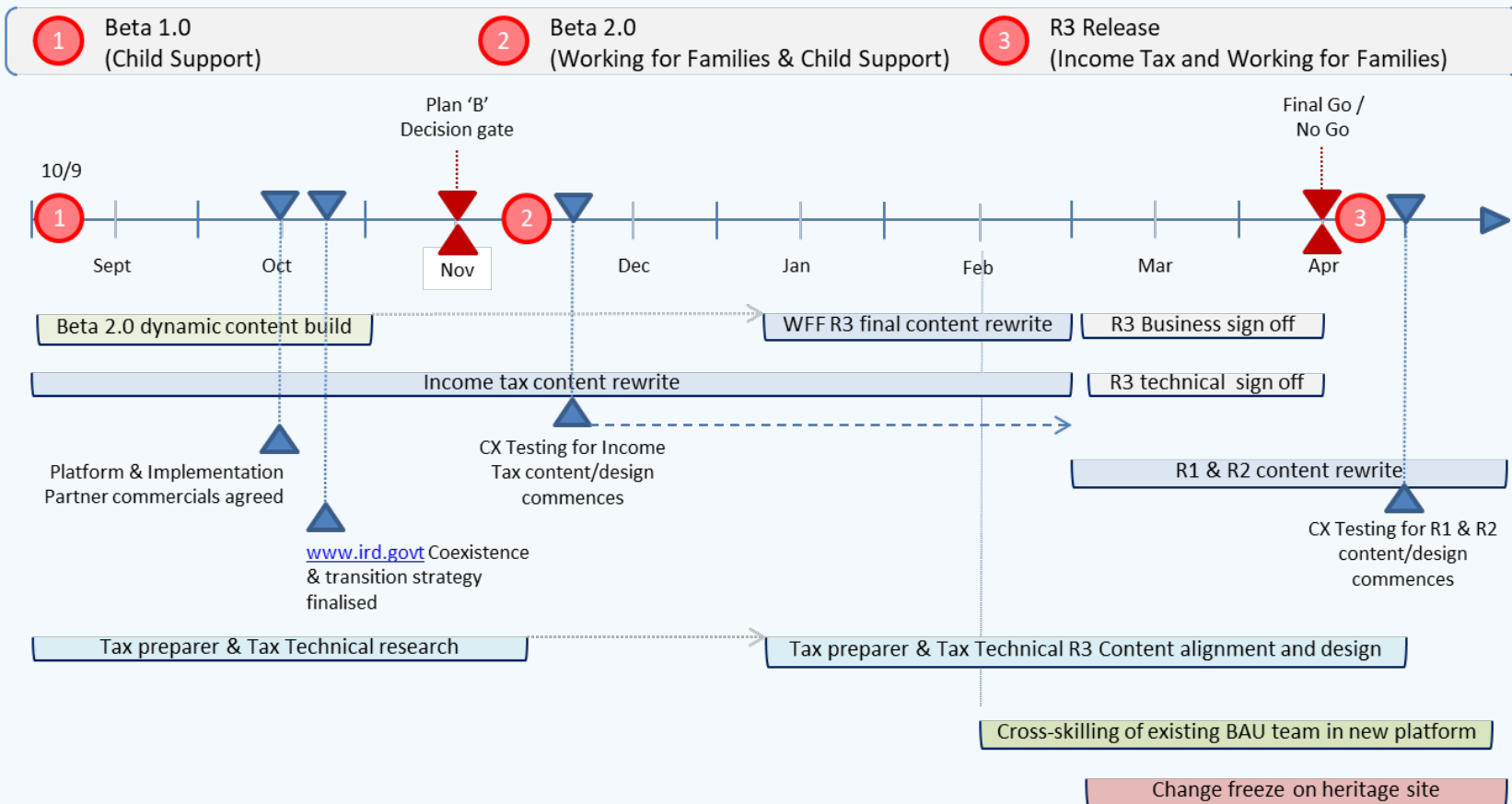# Robust monitoring & easy augment

Local repository will hold approx 100 pages of 'low value' content

Depending on urgency and severity, we will aim to resolve within 1-3 days

Content gaps will be spotted and acted on quickly

The new ird.govt website build for R3 will occur over three major steps

1 Beta 1.0 (Child Support)

2 Beta 2.0 (Working for Families & Child Support)

3 R3 Release (Income Tax and Working for Families)

Plan 'B' Decision gate

Final Go / No Go

10/9

Sept | Oct | Nov | Dec | Jan | Feb | Mar | Apr

Beta 2.0 dynamic content build

WFF R3 final content rewrite

R3 Business sign off

Income tax content rewrite

R3 technical sign off

Platform & Implementation Partner commercials agreed

CX Testing for Income Tax content/design commences

R1 & R2 content rewrite

www.ird.govt Coexistence & transition strategy finalised

CX Testing for R1 & R2 content/design commences

Tax preparer & Tax Technical research

Tax preparer & Tax Technical R3 Content alignment and design

Cross-skilling of existing BAU team in new platform

Change freeze on heritage site

14

— migrating remaining content

What happens after release 3?

With the successful implementation of the [Information redacted] platform, dynamic content model, and reusable patterns and templates for Release 3, it is anticipated that the remaining products and domains will be much more straightforward to migrate from the heritage platform to the new.

By replicating the Beta release approach and delivering 'current state' content for R1 and R2 products, KiwiSaver and Student Loans, we can progress the redesign process and move content incrementally away from [Information redacted] content platform.

This approach allows us to rapidly test content and deliver value to our customers by accelerating the publishing of content to the new platform. The parallel freeze on the heritage site will also allow us to cross-skill the existing BAU team on the new platform so that they can assist with content management and maintenance of the new site.

Addendum

— **addendum**

Beta 1.0 details

Externally hosted on a "Platform as a Service" model (the [Information redacted] Managed Cloud service offering)

- Utilises an off the shelf product ([Information redacted]) with no customisation

- Contains 15 static pages

- Customers will get to it via a link from promotional tiles and banners hosted on the heritage website

- Utilises a simple survey form using the [Information redacted] Forms module to gather feedback

- Contains links back to the heritage website for the following:

  - Forms, guides and calculators

  - MyIR

  - The heritage website itself, in case further information on child support is sought

- There are no deep links on the beta website.

— **addendum**

Beta 2.0 details

◆ Content

- Current state Working for Families Tax Credits content
- All remaining elements of child support (primarily "existing customers")

◆ Refined visual design and page layouts, from the following drivers

- Implementation of the dynamic content model[1]
- Customer feedback from Beta 1.0
- IR staff feedback

◆ Interim home page updated

- myIR login available
- Extra tile added for WFF
- Alerts banner added – to further emphasise this is a beta site

[1] The dynamic content model will act as the engine of the website. Content will be divided into types and blocks which will dynamically appear on a page dependent on the specific situations, roles or tasks a user selects and with the application of behind the scenes tagging and rules.

— addendum

Beta 3.0 details

- Content

  - Current state income tax content

  - Consistent application of meta-tagging, page descriptors and keywords across heritage and new (including tax technical)

  - [Information redacted] search tool implemented to index Beta

- Refined and additional visual design and page layouts, from the following drivers

  - Implementation of the dynamic content model

  - Any feedback from Beta 2.0

  - IR staff feedback

- Interim home page updated:

  - Extra tile added for Income Tax

  - Search Box Added

- Simple Azure search across all of beta 3.0 content that is in CMS. (i.e. No filters or facets).

- Calculators, Forms and guides link through to heritage

— addendum

R3 Go Live details

◆ Content:

- All content updated for BT Release 3 changes
- Single point of access for all of Inc and Fam content (R3 content removed from heritage)
- Possible inclusion of FBT and GST stretch targets (tbc)
- Any feedback from Beta 3.0
- PDFs of forms and guides that are relevant to Inc, Fam and Child Support content being published in R3
- Tools and calculators listing will be provided. Relevant tools and calculators will be provided on the new site and re-skinned where appropriate.

◆ Visual Design:

- Removal of interim Home Page
- Removal of Beta Alerts banner and logos

◆ New IRD homepage using the www.ird.govt.nz url with marketing requirements fully supported

◆ Global navigation facilitating customer journeys across products in both heritage and new

◆ [Information redacted] search with filters and facets configured across heritage and Beta facilitated by the content tagging in the CMS.

◆ Post R3 go-live feedback/query form

◆ Links to supporting content such as About IR, Consultation, Careers etc. will link through to Heritage.

◆ Signed off governance and editorial process for ongoing website management