

Inland Revenue

Customer, Stakeholder and Marketing Plan for Stage 4 START Delivery

Release 2: October 2021

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About this document

Stage 4 is the final step in IR's Business Transformation journey which is currently planned to end in early 2022. This plan sets out the customer communication and marketing approach for Business Transformation Stage 4 START Delivery, Release 2.

Stage 4 START Delivery is made of up three delivery phases:

- S4-1-R1 went live on 1 March 2021.
- S4-1-R2 will go live in October 2021.
- START Delivery 'Other' includes a range of products being implemented between December 2020 and December 2021.

In particular, this plan will focus on S4-1-R2 (Release 2) and some elements of START Delivery Other.

These changes and enhancements will impact all our external stakeholder segments. To reach them, the IR Marketing and BT Communications teams have developed this plan in consultation with internal stakeholders.

It covers:

- Stakeholder engagement: how we will engage with targeted stakeholder groups to build awareness and understanding of the changes that will affect them and their customers / audiences. This will mostly involve business to business engagement, for example through meetings, phone calls, newsletter content, presentations and webinars. For some products we will connect with end users through intermediaries such as tax agents and industry bodies.
- Marketing: the tactics, channels, timing and messaging for marketing campaigns to businesses, intermediaries, individuals and families customers. These will employ a range of both wide-reaching and direct channels such as web content, advertising, social media, community group collateral, letters, emails and texts.

The Marketing and BT Communications teams will work closely throughout the release to coordinate outputs and to ensure consistent and timely messaging. We will integrate activity across:

- The Executive Leadership Team.
- The Business Transformation Programme including the Organisation Change Team, The BT Account Management Team and the Programme Leadership Team.
- Internal Communications, Content Management and Media.
- The External Relationships and Community Compliance Teams.
- The Business delivery leads and any working groups that are set up.

This document provides:

- the high-level context for our engagement, communications and marketing activities
- an introduction to the stakeholder groups that will be impacted by Stage 4, Release 2 and 'other' changes
- a flavour of the messaging for each group
- a point-in-time overview of our planned engagement and marketing activities.



As with previous releases, more detailed tactical plans will be developed for individual products/activities as required.

Not included in this document are:

- Small Business Cashflow (Loan) Scheme (SBC), the Resurgence Support Payment (RSP) and other COVID-19 responses. While these are not included in this document, future impacts from these activities will be considered alongside the deliverables within this plan as they impact the same audiences.
- The Stage 4 Transition and Go-live Communications Plan. This will be developed separately in line with the go-live date.
- START generated letters (operational communications) that will be updated to reflect the myIR changes from V12.

This document covers the changes at a point in time. Specific messages, channels and timelines will evolve as Stage 4 changes are further developed and defined.

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Contents

1	Introduction – the landscape for Stage 4, Release 2	7
1.1	Programme view	7
1.2	What we've delivered so far in Stage 4, START Delivery	7
1.2.1	<i>Release 1</i>	7
1.2.2	<i>START Delivery Other</i>	8
1.2.3	<i>Changes coming in Stage 4 Release 2</i>	9
1.2.4	<i>Impacts on stakeholders</i>	9
1.3	Key challenges	9
1.4	Legislation	11
1.4.1	<i>The Child Support Amendment Act</i>	11
1.4.2	<i>Hague Convention</i>	12
1.4.3	<i>Other</i>	12
2	External stakeholder and customer engagement	13
2.1	Stakeholder engagement approach – BT Communications team	13
2.2	Marketing approach – IR Marketing team	13
2.3	Media Approach	14
2.4	Success Outcomes	14
2.5	Stage 4, Release 2 Impacts	15
2.6	Stakeholder overview	15
3	Areas of Change	17
3.1	myIR upgrade to Version 12	17
3.1.1	<i>Introduction</i>	17
3.1.2	<i>Approach</i>	17
3.2	Child Support	18
3.2.1	<i>Introduction</i>	18
3.2.2	<i>Approach</i>	19
3.3	Tax on income and 'other' changes	19
4	Customer/stakeholder approach and messaging	21
4.1	Government stakeholders	22
4.1.1	<i>Communications approach</i>	22
4.1.2	<i>Planned activities for government stakeholders</i>	22
4.1.3	<i>Key messages</i>	23
4.2	Key influencers and professional bodies	23
4.2.1	<i>Communications approach</i>	23

4.2.2	<i>Planned activities for key influencers</i>	25
4.2.3	<i>Key messages</i>	25
4.3	<i>Intermediaries</i>	26
4.3.1	<i>Communications approach</i>	26
4.3.2	<i>Planned activities for intermediaries</i>	27
4.3.3	<i>Key messages</i>	29
4.4	<i>Businesses</i>	30
4.4.1	<i>Communications approach</i>	30
4.4.2	<i>Planned activities for businesses</i>	30
4.4.3	<i>Key messages</i>	31
4.5	<i>Child support customers</i>	32
4.5.1	<i>Background</i>	32
4.5.2	<i>Communications approach</i>	33
4.5.3	<i>Planned activity for child support customers</i>	34
4.5.4	<i>Key messages</i>	35
4.6	<i>Individuals and families</i>	36
4.6.1	<i>Background</i>	36
4.6.2	<i>Communications approach</i>	37
4.6.3	<i>Planned activities for individuals and families</i>	38
4.6.4	<i>Key messages</i>	40
	Appendix A: High-level tactical plan	41
	Appendix B: Results and measurement for customer engagement	43
	Appendix C: Communications Channels	44
	Appendix D: Key messages	47



1 Introduction – the landscape for Stage 4, Release 2

1.1 Programme view

Business Transformation (BT) is a multi-year, multi-stage change programme which will help IR become a modern world-class revenue organisation. It's about making it simpler, open and more certain for New Zealanders to pay their taxes and receive their entitlements.

Our business case promised we'd deliver the transformation in four stages across a series of releases. We've successfully implemented the first four major releases. Transformation is now in its final phase, Stage 4, and we remain committed to completing transformation as quickly as possible.

Previously our major releases have aligned with the beginning of the tax year in April. Given the impacts of COVID-19, we are implementing the Stage 4 changes progressively. The first release went live on 1 March 2021.

We'll continue to monitor the impact of COVID-19 on our customers and will adapt this plan as necessary to reflect any relevant COVID initiatives and their impact on each customer group.

The landscape for this release differs from our most recent releases as it involves not just products, but our first myIR system upgrade. In this sense it could be seen as comparable to Stage 1 of our Business Transformation, when we moved GST into a new and unfamiliar system. We know customers and our people found the transition difficult and while we don't underestimate the impact of the myIR upgrade to Version 12, specifically on our external stakeholders, we are in a very different place to where we were in Stage 1. We now have our customers' attention firmly focused on everything we do and they are familiar with START. We will begin warming our customers up to the changes early, using the comprehensive suite of channels we have developed over the years. We will also provide practical tools for key internal teams, such as Community Compliance, to aide their conversations with customers. Our approaches for doing this are captured in this document.

1.2 What we've delivered so far in Stage 4, START Delivery

The three delivery phases of Stage 4 START Delivery will see the final elements moved into our new system, some new legislation implemented, and the myIR experience for customers further improved.

1.2.1 Release 1

Release 1 went live on 1 March 2021, migrating into START:

- Paid Parental Leave – including regulation changes to simplify the application process.
- New Zealand Foreign Trusts – including changes to the registration process and allowing providers to link to client myIR accounts.
- Unclaimed Monies - including legislation changes to simplify the process for holder organisations, and
- Duties (casino, lottery and totalisator duties).



All taxes and most social policies are now in the new system, as is all customer information such as contact details.

1.2.2 *START Delivery Other*

By the end of April, a number of other products had also gone live, including:

- Decommissioning E-File and replacing it with new gateway services and APIs.
- Working for Families updates.
- Replacing the KiwiSaver Heritage B2B gateway with gateway services APIs.
- Requiring Payday Version 2 of employment information (Version 1 (for filing only) to be retired in October).

Annual changes in April 2021 included:

- Repealing the child support incremental penalty and simplifying child support penalty write-off rules.
- Enabling the In-Work Tax Credit component of Working for Families to continue to be paid in the first two weeks of the customer being out of work.
- Applying the same penalty and interest rules to voluntary employer KiwiSaver contributions as apply to compulsory contributions.
- Enabling overpaid tax on Portfolio Investment Entity (PIE) investment income to be refunded as part of the customer's individual income tax assessment.
- Applying a collection of other changes to income tax returns including the IR3.

In addition, the Taxation (Income Tax Rate and Other Amendments) Bill introduced further changes in April. There are four main measures:

- A new top personal income tax rate of 39%.
- Increased disclosure requirements for trusts.
- Increasing the Minimum Family Tax Credit threshold for the 2020-21 tax year, and
- Clarifying the ability for Inland Revenue to require information for the purposes of providing quality policy advice.

Some of these activities are still in flight including:

- The KiwiSaver heritage B2B gateway will remain in place until December 2021 as KiwiSaver Providers transition to the new APIs.
- While officially Payday Version 2 was required from 1 April, we are allowing extensions until October (date to be confirmed) at which time it will become mandatory.
- The new top personal tax rate is associated with other changes, some of which are still to come into effect. For example, the RWT rate changes, will come into effect in October 2021.

While not part of Release 2, we will ensure they align with, and where appropriate are included in, our messaging and channels.



1.2.3 *Changes coming in Stage 4 Release 2*

Release 2 is planned to go live in October 2021 (targeting Labour Weekend). It includes:

- myIR and START upgrade from Version 11 to Version 12
- migrating child support into START
- child support legislation changes (there will also be more coming in April 2022), and
- some tax on income change.

Stage 4 Release 2 changes are the focus of this plan.

1.2.4 *Impacts on stakeholders*

Release 2 has some different characteristics from Release 1. For example:

- The upgrade to Version 12 will impact all our customers, although some to a greater degree than others. We will need to strike the right balance between focusing on those highly impacted stakeholders while maintaining the right level of educative communications to broader, less impacted customers.
- Child support customers will be impacted by the child support legislative changes and the move to START.
- The impact of Release 2 on businesses will be low to medium depending on the frequency and complexity of their myIR use, and whether/how they are impacted by the child support changes.

To give an example of some of our audiences, Stage 4 will impact:

- 5,500 tax agencies (and their employees who use myIR). These will again be a key stakeholder group that will be highly impacted, particularly by the Version 12 upgrade.
- 40,700 complex organisations, such as significant enterprises, that use myIR.
- 642,000 small businesses or sole traders who use myIR frequently.
- 1,270,000 individuals with social policy accounts who tend to use myIR a few times a month.
- 1,452,000 individuals who use myIR infrequently.
- 156,000 liable parents who pay child support and 163,000 receiving parents and carers.

1.3 **Key challenges**

In delivering Release 2 customer engagement, we will face the following key challenges:

1. **Raising awareness of the changes and educating affected customer groups about what the changes mean for them.**

In particular, the myIR Version 12 upgrade will affect all customer groups to varying degrees. We need to be aware of the impact and communicate it effectively to all users of myIR without creating concern or uncertainty.

Child support customers will need to adapt to the new legislation and processes, as well as a new system (Version 12). They will require clear information about what they need to know and do, and when. There is a risk highlighted in the impact assessment that will be tested in the mock go-live, that manual workarounds for a small number of child support customers are not passed through into START. To mitigate this, we will be ready with



internal and external communications to support customers with why and how to resolve this.

2. Managing change fatigue.

After four years of change we are updating the entire system. While it will improve myIR for our customers, it could prompt questions about the need for a wholesale change for a newly built system. We will be careful to 'keep it real' - being clear that this is an upgrade not a system change, and by scaling information according to need.

This will be particularly important to consider for customer groups who have been through several rounds of changes already. Tax intermediaries will again be a key group where we will need to manage / mitigate change fatigue.

At the same time, we will communicate that the end of business transformation does not signal the end of change. Customers will see continual improvement and future enhancements managed with the same rigour as the BT programme but scaled appropriately.

Customers affected by the Release 1 changes (Paid Parental Leave, Duties, New Zealand Foreign Trusts and Unclaimed Money), will be faced with another change eight months after the initial go-live. While a challenge, it is also an opportunity as we already have momentum and contact with these customers and can introduce Release 2 as an ongoing part of this engagement.

3. Retaining and building confidence in Inland Revenue through the final stage of our transformation.

It is important that we maintain trust with our customer groups. Through our stakeholder engagement, marketing and communications we will help to create customer buy-in, positive behaviour change and minimise reputational risk.

4. Getting the timing right and aligning with other engagement activities with customers as part of their IR compliance obligations.

We will need to strike a balance between warming customers up to the changes ahead and providing the details when they need to know them. This includes aligning messaging with annual events. One of these challenges is that the main GST filing date falls on 28 October which, if we go live over Labour Weekend, will be three days after the move to Version 12.

5. Catering for other dependencies.

There may be impacting factors that are not part of Release 2. For example, moving all employers to payday filing Version 2 before the Release 2 go live. Version 2 is critical for child support.



1.4 Legislation

Legislation impacting Release 2 has been passed and will come into effect in April 2021 (some child support) and October 2021 (the majority of child support and the Hague Convention). There is also legislation that will come into effect in April 2022 (child support changes that impact payment calculations). This means we can speak with certainty about some of the legislative changes we are implementing but not others. Changes in April 2022 will be communicated to the relevant audiences in March/April 2022 as part of marketing BAU.

1.4.1 *The Child Support Amendment Act*

The Child Support Amendment Act includes changes taking effect in April 2021, October 2021 and April 2022. Broadly the changes that will impact our customers are:

April 2021:

- Removing the incremental penalties.
- Simplifying the penalty write-off provisions.

These changes are in effect. As part of this, the Families segment is planning to contact relevant child support customers (liable parents) to write off their historic incremental penalty debt.

October/November 2021:

- Compulsory employer child support deductions from salaries (for newly liable customers).
- Further changes to the penalties:
 - Moving the second stage of the initial late payment penalty to 28 days after the due date.
 - Removing the \$5 minimum from the initial late payment penalty.
 - Introducing a 60-day grace period for customers new to or re-joining child support, before they are charged penalties.
- Extending existing temporary exemptions to liable parents based overseas who are in prison or hospital.
- Introducing exemptions for customers suffering long term injury or illness.
- Introducing a minimum age of 16 for a child to be considered financially independent.
- Continuing child support until the end of the school year for a child remaining at school past the age of 18
- Introducing time constraints for the provision of court orders of parentage for back dating assessments.
- Introducing timeframes for first assessments; giving customers 28 days from the date they are notified of their assessment to advise of their existing circumstances.
- Allowing IR to offset the amounts owed without the customers having to apply for an admin review.
- Introducing a four-year time bar on child support reassessments.



For Release 2 the marketing and communications teams will focus on these October changes.

April 2022:

- Repealing the use of the mixed-age expenditure table.
- Including investment income (interest and dividends) in the salaries/wages assessment; and moving from taxable income to net income.
- Estimation changes including:
 - Allowing for estimations made within 28 days of a customer's assessment to be backdated to the start of their child support.
 - End of year reconciliation of estimations.
- Giving IR the discretion to adjust the child expenditure calculation in complex care situations.

Ensuring that we tell child support customers what they need to know only when they need to know it, communication of these changes will fall outside of the Release 2 timeframe.

1.4.2 Hague Convention

The Hague Convention, on the International Recovery of Child Support and Other Forms of Family Maintenance, is a multilateral treaty which provides for the recovery of child support and other forms of maintenance when the liable person resides in a different country to where the child support or maintenance assessment was raised. On 26 November 2019 New Zealand signed the Hague Convention which is likely to come into effect in October 2021.

The approach to stakeholder engagement is detailed in The Hague Convention on the International Recovery of Child Support and Other Forms of Family Maintenance 2007, Stakeholder Engagement Plan. This has been developed by a team in the business that is managing the Hague Convention work. BT Communications can support this work as required. There is unlikely to be any marketing required other than supporting the media team with media releases and responses to potential questions.

1.4.3 Other

Government may introduce further legislation that may need to be factored into the BT Programme.



2 External stakeholder and customer engagement

This section further describes our impacted stakeholders and customers in Release 2 and our approach to engaging them.

2.1 Stakeholder engagement approach – BT Communications team

A key role of the BT Communications team will be to support the BT Account Managers, and the business, in providing timely, consistent, targeted communications to external stakeholders. To achieve this, we will do the following.

- Communicate any planned external messages to our people first.
- Communicate to key stakeholders second, so there are no surprises for impacted businesses and partners. This means:
 - Engaging first with professional bodies, the Tax Agent Cohort and providers, then tax agents, industry associations and consumer advocacy groups as appropriate.
 - Helping those organisations and groups to cascade consistent messages to their staff, members and customers.
- Carefully manage messaging:
 - Phasing communications through awareness, understanding and readiness for go-live followed by a support phase (Early Life Support).
 - Scaling engagement to reflect the extent of each area of change.
 - Bundling messages for customers interested in multiple changes.
 - Repurposing messages in different channels.
- Continue to take a coordinated, joined up approach to managing external stakeholders, presenting with one voice.
- Take an 'open and transparent' approach to engaging and communicating with our stakeholders, customers and our people.

2.2 Marketing approach – IR Marketing team

A key role of the IR Marketing team is to identify the key impacts for customers and provide timely, consistent, targeted communications preparing customers for the changes.

For Stage 4 Release 2, we will use multiple channels, most notably several rounds of highly targeted direct marketing (letters, emails, text messages) supported by website content, advertising and community group collateral.

The messaging and approach will be adapted based on the impact of the change, research monitoring, information from the DIP platform, direct feedback from customers, contact centre feedback and social media observations. The goal is to guide customers on the journey from awareness to understanding and readiness, as outlined in the customer impact assessment.

The approach will vary based on the changes and detailed customer segmentation and will include a range of channels and tactics that will work together to amplify the relevant key messages, ensuring they are received by the intended audiences. This includes aligning with other BAU marketing and communications activity to make sure messaging is sequenced correctly, is consistent and relevant and that we don't overload customers. COVID-19 messages may be included as and when necessary.



2.3 Media Approach

The IR marketing and BT Communications teams will work closely with the media team to identify significant milestones and other opportunities for both proactive and reactive media activity – including releases, interviews, media briefings or other newsworthy events as appropriate.

IR's news website (<https://www.media.ird.govt.nz>) is the channel for news releases. All releases are made through the site and reach all key stakeholders by way of email alerts and Tweets on the media Twitter feed, at the same time as they reach the news media outlets. This is an effective tool that has reach well beyond the mainstream media; for example, it supplements our proactive, targeted activities for trade, industry and social interest groups and reaches the social media news environment. We can include video material – spokesperson interviews for example, to supplement releases if there is enough time in advance.

A key area for the Media Team will be child support as there may be a number of sensitivities in this area that will see system, process and legislation change and a greater focus on compliance. We may see interest from journalists.

A more detailed tactical media plan will be made closer to the timing of the milestones identified and at other times depending on what is happening in the news media environment and what opportunities present themselves. Messaging will be guided by the communications plan and by what the Media team determines as most likely to engage the interest of the news media. Spokespeople will be recommended for each proactive/responsive opportunity – emphasis will be on moving responsibility for media representation from the BT programme to the business – particularly the Commissioner, BT Deputy Commissioners, the two CCS Deputy Commissioners and the customer segment leaders across individual and business.

2.4 Success Outcomes

Customer engagement and marketing activities will contribute to the following outcomes:

- The majority of child support customers (both liable parents and receiving carers) are aware of the Stage 4 legislative changes and the myIR changes and self-service options.
- The majority of individuals and families, impacted by the change or who use myIR more than twice a year, are aware of, and ready for, the myIR version 12 changes affecting them. (Those who use myIR less than twice a year will learn of the changes through BAU communications).
- The majority of businesses and intermediaries are aware of and ready for the myIR version 12 changes affecting them.
- The majority of key influencers (such as professional bodies and advocacy groups) are aware of the legislative changes (particularly child support) and myIR version 12 changes that affect their stakeholders/customers.
- The majority of Government stakeholders are aware of and ready for the legislative changes (particularly child support) and myIR version 12 changes that affect their departments.

Stage 4 customer engagement activity will be measured against the above outcomes and other key metrics, e.g. marketing metrics. See *Appendix B: Results and measurement for customer engagement* for more information about these metrics.

2.5 Stage 4, Release 2 Impacts

In general, a medium impact is expected across customer groups, depending on the change. There is one pocket of high for the V12 upgrade impact on tax intermediaries. Overall, the most highly impacted customer segments are Tax Agents/intermediaries, Families (most notably child support customers), Employers, and some government agencies.

Most changes should be received positively but customers will need adjustment periods to familiarise themselves and become comfortable with the change.

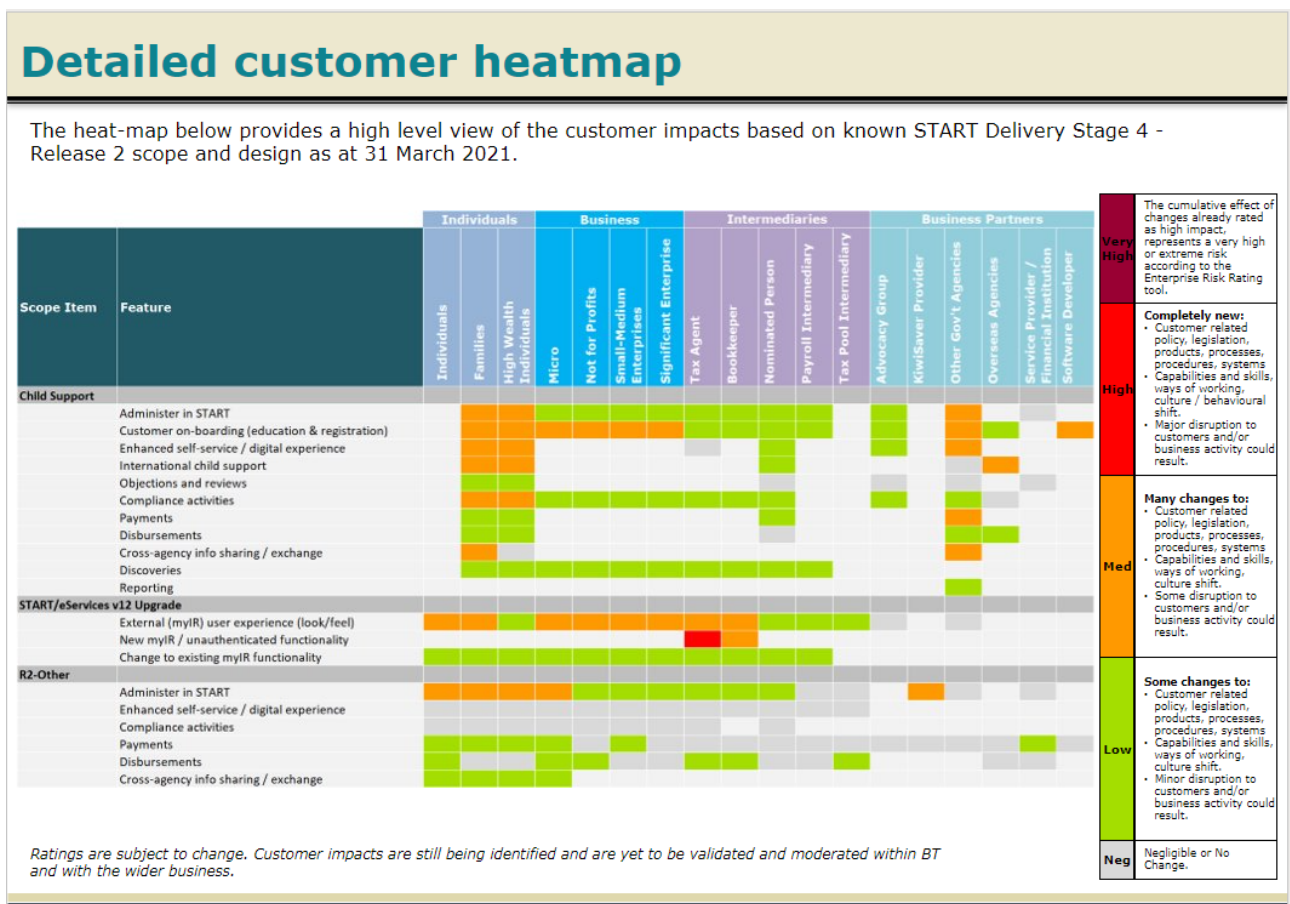


Figure 1: Customer Heatmap

2.6 Stakeholder overview

Stakeholders are categorised into four groups:

- Government
- Key Influencers

- Customers
- Service Providers

Almost all of our stakeholders fall into more than one of these categories and interact with us in different ways:

Government	[Information redacted]
Key Influencers	<ul style="list-style-type: none"> • Transformation Reference Group • Professional bodies/associations • Tax Agent Cohort • Media and industry commentators • Advocacy groups
Customers	<p>Business</p> <ul style="list-style-type: none"> • Employers (including government agencies) • Microbusiness • Not for Profit • Small to medium enterprises • Significant Enterprises <p>Individuals</p> <ul style="list-style-type: none"> • Families • Child support (we have separated child support from Families for purposes of this plan) • Individuals (including nominated persons) • Māori <p>Intermediaries</p> <ul style="list-style-type: none"> • Tax Agents • Bookkeepers • Payroll intermediaries and Bureaus
Service Providers	<ul style="list-style-type: none"> • Software developers • Payroll software developers • KiwiSaver scheme providers • Financial institutions

Figure 2: Stakeholder overview

3 Areas of Change

For external stakeholders, Release 2 consists of:

- Two products - child support and tax on income (particularly negative adjustments for PAYE), and
- a myIR system upgrade (to Version 12).

We acknowledge that upgrading myIR to Version 12 will be very different from the traditional products we have released throughout the Business Transformation programme and we will look for new approaches to introducing this change while drawing on tried and true channels.

While varied, the Release 2 changes will have overlapping stakeholders. This will require a tailored but also highly coordinated approach to our engagement and communications.

3.1 myIR upgrade to Version 12

3.1.1 Introduction

In October 2021, START and myIR will be upgraded from the current Version 11 (V11) to Version 12 (V12). The V12 upgrade has two parts:

- Internal – changes to START.
- External – changes to myIR.

There will be a medium to high impact for customers who use myIR. All customers who use myIR will see changes to the navigation, and the look and feel, including how calls to action are presented and how summary views and balances are displayed for all products.

At a high level while the overall customer experience will improve, there will be a period of readjustment.

The upgrade to version 12 presents an opportunity to re-engage customers with myIR functionality, focusing on their needs and benefits as opposed to product specifications.

3.1.2 Approach

BT Communications and IR Marketing will work with Account Managers, Relationship Managers, Community Compliance and other internal teams to communicate and engage with external stakeholders to ensure they understand what they need to know and do. We will tailor our messaging and channels to reach specific customer segments.

Since August 2020, the Digital Ecosystems team has been engaging with key stakeholder groups for the design, build and testing phases. They are also undertaking customer testing and surveys as part of the 'understanding' phase of our stakeholder engagement.

Feedback and sentiment from these engagements will help to inform our communications.

As noted, implementing this system upgrade will be very different from implementing products. For each release to date, we have used a mix of online instruction, webinars, seminars, face to face engagement, newsletters, direct mail and social media to support customers through the change. While this has provided a level of support which has allowed customers to familiarise themselves with the change relatively quickly, the upgrade to myIR has been recognised as a different and potentially greater challenge.



To reach our audiences effectively we will:

- (proposed approach, to be confirmed) incorporate task-based, easily searchable, contextual help on our website in the form of click stream videos and screen sequence (screen shot) guidance. These will be developed based on need as identified in customer testing. This solution would focus primarily on tax intermediaries but could extend to other customer segments. For specific 'hotspots', links will be embedded from myIR directly to the relevant guidance. This would help tax intermediaries (in particular) with myIR at the point they are trying to use it.
- segment the customer groups to better understand their needs, the best channels to use (including seasonal / operational channels) and when they need specific information.
- use existing channels in a way that better supports the upgrade. For example, five-minute, activity-specific 'warm up' webinars and 'how to' video demonstrations supplemented with printable quick reference summaries.
- be mindful that child support customers may need particular care as they may have quite complex circumstances and are facing other changes as part of Release 2. We will work closely with the child support product team to align our messaging and timing.
- overlay the timing of our messaging with other events (e.g., annual events) that will impact the same customers. This will help to ensure people receive the messaging only as they need it.
- upskill and engage our people with myIR (as well as START), and provide them with practical tools, so they are better placed to assist our customers.

3.2 Child Support

3.2.1 Introduction

As part of Release 2, child support changes will:

- safely transition child support into START
- modernise and improve information shares, service options and self-management tools
- deliver straight through processing, with fewer manual interventions, and automate large transactional processes
- better integrate International child support into core systems, and
- deliver legislative changes to improve fairness, simplify aspects of the scheme, improve compliance and deliver on Government goals to improve the wellbeing of children.

Changes to child support will impact those involved in the child support process including those who pay and receive child support payments, employers of people who pay child support and partner agencies.

Other than awareness, there will be a lower impact on tax intermediaries.

Changing visibility of child support obligations and payments in myIR and improved self-management services will benefit child support customers and their nominated persons.

Customers and employers will be impacted by legislative changes including the introduction of compulsory employer deductions for most newly liable paying parents.

Modernised information sharing with other government agencies will help to streamline child support processes.



There will be new functionality for contracted lawyers who conduct administrative reviews.

3.2.2 Approach

Our approach will reflect that many child support customers have complicated and sensitive circumstances and need information and solutions to be as straight forward and simple as possible. They will require reassurance that their circumstances are understood, we have the correct information, and that all parties are taking the actions required to administer the child support assessment or agreement.

Considerable time and attention may be required to ensure we are engaging with this audience appropriately, in collaboration with other government organisations and IR internal groups.

In the understanding phase, this may include:

- a layer of Maori/Pasifika targeting for our advertising, particularly around the child support changes,
- community outreach/engagement activity (for example, this might include posters at local GPs),
- engaging with selected advocate groups to ask how best we can connect, through them, to their communities (for example, via Iwi radio stations and maraes), and
- continuing to build our database to include those who may not have been targeted in other releases (such as father support groups).

In the support phase, we will need to respond quickly to issues or concerns raised. We can do this through:

- updated web content providing subject-specific responses to issues,
- social media posts / ads to promote the information on the website (these could be partially translated),
- targeted text messages, and
- targeted, printable updates for community advocacy groups, covering specific issues or concerns and translated as required.

We will also work with the media team as there may be media interest in this product.

3.3 Tax on income and 'other' changes

Mostly, the tax on income and 'other' changes will require minimal to no communication to external stakeholders. Those that may require some messaging include:

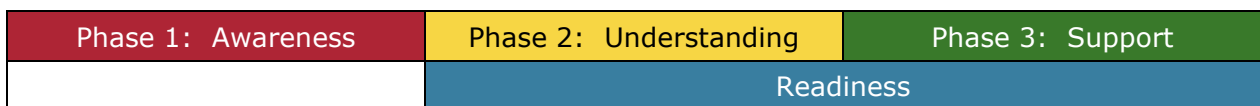
- Negative adjustment for PAYE - which will impact employers that will be able to, if certain validations are met, enter a negative value in an Employment Information (EI) file when accounting for adjustments for a prior period. We will communicate this change as part of our wider communications to employers and tax intermediaries, being careful not to oversell the message given the limited number of customers that will meet the validations.
- Credit and debit card convenience fees – will impact student loans and child support customers who make payments with overseas banks' credit/debit cards. As part of the Release 2 changes, we will no longer cover the convenience fee on credit and debit card transactions but will pass these on to customers. We will weave this messaging into our promotion of the variety of payment options available to our customers, including existing obligation due date communications.

- Audit correspondence – will impact business owners whose historic audit correspondence will be visible in myIR. From October 2021 some audit letters from 2017 onwards will be moved to myIR. These will be visible to anyone with administrator access. We will bundle this message with other employer / business communications.
- Bankruptcy - customers who go through bankruptcy processes will no longer be allocated a new IRD number. This will only affect those customers that are facing bankruptcy, and their tax intermediaries where applicable. We will include high level messaging as part of our wider communications to those audiences.

4 Customer/stakeholder approach and messaging

The communications approach is based on the successful rollout of previous releases. The goal is to guide customers on the journey from awareness to understanding and readiness, as per the customer impact assessment. The timing of the phases will differ for each audience, based on the expected impacts and whether they need to take any actions to prepare for the changes.

Since the beginning of Stage 4 Release 1 we have been warming up employers, tax intermediaries and advocacy groups to the changes coming in October this year. For customers and stakeholder groups that will be highly impacted, we'll start to build further **awareness** that changes are coming and broadly what they are. In the lead up to go-live we will build our customers' **understanding** of the changes pre and during go-live. Post go-live we will **support** customers and encourage them to find out more about the relevant changes including new or improved features in our website content and myIR. The understanding and support phases will help ensure customer readiness.



	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Government stakeholders							
Key influencers							
Intermediaries							
Businesses/employers							
Child support customers							
Individuals/families							
Customer readiness checkpoints	14 th CP1	23 rd CP2a	26 th CP2b	26 th CP3	18 th CP4a		

Figure 3: Overview of the three phases for each audience group

In depth customer testing is being managed by the Digital Ecosystems team to better understand the response of customers who use myIR, to the V12 changes. The testing is expected to run through to July 2021 and will help identify the benefits for customers and areas that may require additional support. This will be used to develop tailored messaging for each audience.

In this section we look at the communications approach for each customer group, the planned activities for the Marketing and BT Communications teams and some of the key messages.



These provide a starting point and will be adapted and expanded further as the scope and designs are progressed.

Appendix C: Communications channels further describes the channels and how they are used. *Appendix D: Key messages* shows the wider context of how our stakeholders and customers will be engaged and informed for Release 2.

4.1 Government stakeholders

4.1.1 Communications approach

As with previous releases we will contribute to updates to Ministers and Cabinet ensuring they are updated on the progress of the BT Programme, and that Members of Parliament know how the changes may impact their constituents. These stakeholders will be briefed prior to external customer or advocacy groups.

Key stakeholders for Stage 4 Release 2 are:

[Information redacted].

Some government agencies will be directly impacted by the changes, particularly those involved with child support.

Inland Revenue works with external agencies to administer child support. These are: These agencies will require varying levels of communication support depending on their role and the impact on their own customers. We are working closely with them to align the content and timing of our messaging where appropriate and to help ensure they are up to date with the changes that impact them and can make the necessary preparations.

The agencies will require varying levels of communication support depending on their role and the impact on their own customers. For example, information sharing and communication with [Information redacted] and [INFORMATION REDACTED] will be improved including through a new digital portal.

We will also include government agencies in our messages for employers.

4.1.2 Planned activities for government stakeholders

Phase	Activity
Ongoing throughout Release 2	<ul style="list-style-type: none"> • Contribute to weekly and monthly Minister / Joint Minister reports. • Support BT account management activities. • Contribute to cross agency communications activities including for any co-design and planning with affected agencies. • Send monthly Transformation Newsletters providing high level updates about the changes and linking them through to the website landing page for more detail.



Phases 1 and 2: Awareness and understanding	<ul style="list-style-type: none"> • Updates and webinars: to inform agencies of any new or changing obligations they may have as employers (including the impact of closing payday filing version 1). • MP packs prior to cutover to ensure Members of parliament know about the changes that may impact their constituents.
Phase 3: Support	<ul style="list-style-type: none"> • Cross agency open home: We can consider whether there is value in a cross agency 'open home' to walk through key V12 changes. It would be similar to that done for Release 4 which focused on the 'doers'. In this case it might include payroll and finance teams who may be highly impacted by V12 changes.

We will carefully assess the correct channel and path for engaging with government stakeholders. For example, some messages will need to come from the Commissioner to Chief Executives; others will be managed through account management or product teams; or via the Government and Ministerial Team; other messages will come through BT communications channels to the agencies' communications or change teams.

4.1.3 Key messages

The key messages will be tailored based on the stakeholder audience, the impacts of the changes for them and the communications channel.

Draft key messages:

- This is the final stage of the BT programme but it won't be the end of change.
- The timing and implementation of the changes, including legislative changes.
- In October we will be upgrading our myIR platform. The new layout will make it easier for our customers to see and action important information and there will be more functionality for certain tasks.
- Agencies directly impacted by child support changes, will need to understand the impact of this on their processes, staff and customers.
- Some government agencies will benefit from new digital options being available to them. These agencies will need to adapt their business processes to incorporate these and may need a fair amount of support from IR.
- Changes for employers, such as child support deductions.
- Who to contact for more information.

4.2 Key influencers and professional bodies

4.2.1 Communications approach

In the stakeholder engagement space, advocacy groups like industry associations and professional bodies [Information redacted], business groups [Information redacted], community groups and industry influencers are important conduits for engaging with end-users.



They represent customers who will be impacted by Release 2 in different ways. Most will be impacted by the myIR upgrade to V12; some community groups will be particularly interested in the child support changes and may be very vocal in advocating for their members; and many will have members who are impacted by the changes for employers.

Industry and professional bodies should receive critical messaging ahead of their members, so they are prepared for calls and questions. They can also advise Inland Revenue on how and when their members should be contacted.

BT Communications has a stakeholder database with over 600 organisations. We send our monthly Transformation Newsletter to these organisations (as well as to 4,500 subscribers) as well as updates on specific topics, for example COVID relief initiatives. We can segment this database by business association, community organisation, government agency, industry association, Iwi, professional body, sports body and trade association. Many of these are, or represent, not for profits.

These groups will want certainty around what to do and how to do it and we will be proactive in directing the right message to the right organisations.

These groups receive the most relevant messages based on their members. We'll work closely with the BT Account Managers, External Relationships and Community Compliance teams to ensure we're reaching the right influencers.



4.2.2 *Planned activities for key influencers*

Phase	Activity
Ongoing throughout Release 2	<ul style="list-style-type: none"> Support BT account management and community compliance activities. Send monthly Transformation Newsletters providing high level updates about the changes and linking them through to the website landing page for more detail. Presentations for conferences.
Phase 1: Awareness	<ul style="list-style-type: none"> Update the Business Transformation webpage to direct customers to the landing pages for Release 2. High level webinars on the upcoming changes. Provide high level content and articles for advocacy group outputs.
From phase 2: Understanding	<ul style="list-style-type: none"> Short webinars on using V12. Quick reference guides to accompany the webinars. More detailed webinars on child support changes. As we get closer to go-live this content would move to the website and quick reference guides would likely become 'task pages'. Provide more detailed content and articles for advocacy group outputs. Targeted updates for specific milestones or topics. Fact sheet on the key changes for child support.
Phase 3: Support	<ul style="list-style-type: none"> Day 1 packs to explain the key things their members may need to know post go-live. Consider canvassing key groups on any missing information that we can produce webinars or web content on. This can continue post go-live.

4.2.3 *Key messages*

The key messages will be tailored for the stakeholder group and will be relevant for their end customers/members.

Draft key messages:

- We will provide regular updates on the timing and implementation of the changes, including legislative changes.
- The key changes in child support and how they can help to inform their members.
- In October we will be upgrading to a new version of myIR. The new layout will make it easier for you and your customers/members to see important information and perform

certain tasks. We will provide support to customers on how to navigate and use the new version of myIR.

- For those representing employers, your customers/members may be able to enter a negative value in an EI (Employment Information) file when accounting for adjustments for a prior period.
- There will also be changes to what you/your members will see in your myIR accounts. Some information that is currently available but hard to find may be more visible and may need additional explanation.

4.3 Intermediaries

4.3.1 Communications approach

Tax intermediaries will continue to be one of our most important audiences. As frequent users of myIR they will be significantly impacted by the myIR changes and will require ongoing support. The approach and message will vary across the three key segments:

- **Tax Agents:** There are approximately 5,500 tax agencies with 31,000 employees, of which we have contact details for about 18,000. These tax agents represent approximately 2.5M clients.
- **Bookkeepers:** There are around 128 bookkeepers registered with us and approximately 5,500 companies that provide bookkeeping services, but do not meet the criteria of 10 clients to register with us. The [Information redacted], is an important stakeholder which has approximately 1,092 members.
- **PAYE intermediaries and payroll bureaus:** There are 18 PAYE intermediaries representing approximately 20,000 employers and 14 payroll bureaus representing approximately 800 employers. It is difficult to get accurate volumes due to the payday reporting process which provides visibility of the software the filing has come from rather than the intermediary or bureau.
- **Other representatives:** There are 11 registered Intermediaries who aren't covered by the above segments but who interact with IR on behalf of at least 10 clients. Examples include Investment income intermediaries, liquidators and donations tax credit intermediaries. They will be impacted to some extent as they have been set up with the tax preparer tab in myIR.

A key insight from previous releases is that some intermediaries are generalists, and even though they don't need to know all the detail, they need to know something about everything. Other intermediaries are specialists and need to know all the detail about some things.

We'll use the information we have available to create sub-segments of customers. Customer research will also be run at key checkpoints to measure intermediaries' awareness of the changes and identify the perceived benefits or potential issues. This will enable us to tailor and target the appropriate messaging ensuring that the right people get the right message at the right time.



Segmentation will be based on the following:

- Intermediary type (eg bookkeeper/tax agent).
- myIR role (eg owner/admin).
- myIR login frequency (eg 1-2, 3-5, 6-10, 11+ times per month).
- Tax agents who have a customer master link with a customer who will see old audit correspondence in myIR.
- Tax types (eg EMP and KiwiSaver).
- Their size (no. of clients/employees).
- Those who still use workspace frequently and need to be transitioned to 'quick access'.
- What they need to know, and when.
- Whether they are they likely to need more support (profiling based on who called or emailed in previous releases).

4.3.2 *Planned activities for intermediaries*

Phase	Activity
Ongoing throughout Release 2	<ul style="list-style-type: none"> • Support BT account management and community compliance activities. • Supporting engagement with professional bodies and the Tax Agent Cohort. • Monthly Agents Answers, Business Tax Update articles and Transformation News. High level updates about the changes. Link them through to the landing page for more detail. • Send information through the monthly tax update and through ad hoc updates as required. • Update Top solutions to promote key milestones.
Phase 1: Awareness	<ul style="list-style-type: none"> • High level presentation introducing the V12 changes, to assist BT Account Managers, ComCom and others in their stakeholder engagements. • New landing page added to IR website (late July - early August). This will provide information about the changes to myIR and any legislation that could impact them. • Direct marketing including emails and letters (mid-late June). Tailored for sub-segments based on the most highly impacted. These will drive customers to website for more detail of the changes. • Update the Business Transformation webpage to direct customers to the landing pages for Release 2. • High level webinars on the upcoming changes.
Phase 2: Understanding	<ul style="list-style-type: none"> • Updated landing page and topic webpages (pre go-live). Provide information about the changes to myIR and any legislation that impacts them. Include 'how to' information through videos or task pages.



Phase	Activity
	<ul style="list-style-type: none"> • Direct marketing including emails and letters (mid-September). Tailored for sub-segments based on the most highly impacted. Drive customers to website for more detail of the changes. • Targeted digital advertising (September). High level updates about the changes. Link through to the landing page for more detail. • 'How to' content – videos and/or guides. Provide examples of what's changing and how to do the tasks in V12. Videos could be animated, making them editable if the V12 screens change during Phase 2. • Short webinars on using V12 (or CBT /support packages on most frequently used tasks) for those topics not covered in the webinars. • Quick reference summaries to accompany the webinars. • As we get closer to go-live this content would move to the website and quick reference guides would likely become 'task pages'. • Support packages (webinars and summaries) for Community Compliance.
Phase 3: Support	<ul style="list-style-type: none"> • Updated landing page and topic webpages (after go-live). Provide information about the changes to myIR and any legislation that impacts them. Include 'how to' information through videos or task pages. • Direct marketing including emails and letters (early mid-October). Tailored for sub-segments based on the most highly impacted. Drive customers to website for more detail of the changes. • Direct marketing including emails and letters (after go-live). Tailored for sub-segments based on the most highly impacted. Drive customers to website for more detail. Include Day 1 packs. • Targeted digital advertising (October). High level updates/benefits about the changes. Link through to the landing page for more detail. • Contextual guidance on the web. If the approach is approved, we will provide and promote these guidance assets on the web (with hotspots linked to directly from myIR). • Canvas key groups on any missing information that we can produce webinars or web content on, continuing post go-live.



Phase	Activity
	<ul style="list-style-type: none"> • Social media to highlight key milestones and link to relevant how to videos e.g. 'How to file GST' in myIR targeting those with a 28 October due date.

4.3.3 Key messages

Message development is currently underway and will be informed by customer testing with tax agents and other intermediaries. Some of the myIR upgrades have been purpose built in consultation with tax agents and other intermediaries to allow them to better self-serve.

Themes to be addressed include:

- For tax agents the changes are largely seen as positive but not a significant improvement – don't oversell it.
- IR is seen as helpful, but some intermediaries think that it can be difficult to get the help/advice they need.
- Alerts functionality will be improved. For example, the Intermediary Centre will provide alerts across an intermediary's client list.
- Tax intermediaries feel responsible for their clients and want our systems to automate some processes to help them get it right.
- Workspace is being replaced with the Intermediary Centre which will provide an uplift of the current tax preparer functionality.
- Tax agents with a customer master link will have new visibility of some historical audit correspondence.

Draft key messages:

- Include supportive and helpful messaging for customers more likely to need help with links to guides and more info.
- In October you'll notice some changes to myIR. The new layout will make it easier to see important information and to perform certain tasks.
- A new Intermediary Centre will allow you to perform 'intermediary functions', from any level within myIR. This will replace the Tax Preparer tab and the Tax Agent Workspace currently in myIR.
- For customers who still use Workspace, we will clarify when Workspace will no longer be available, and how they can perform those tasks going forward.
- For tax agents who have the customer master link - from October 2021 you may notice some old audit letters are now visible in myIR.
- If your client is an employer, if certain validations are met you will be able to enter a negative value in an EI (Employment Information) file when accounting for adjustments for a prior period.
- There will also be changes to what your customers see in their myIR accounts. For example, some information that is currently available but hard to find may be more visible.



- If your clients pay or receive child support, they will be able to complete more actions in myIR.

4.4 Businesses

4.4.1 Communications approach

There are approximately 680,000 business customers including around 200,000 employers. The customers who are most affected are those who use myIR and will be impacted by the myIR upgrade to Version 12, and employers who will need to deduct child support payments for newly liable parents.

There is an opportunity to 'sell' myIR to those business customers who have not yet registered for an account.

The audiences will be segmented based on the size of their business, their myIR login frequency and whether or not they are an employer.

As we can't identify employers of newly liable (or returning) child support customers ahead of time, we will communicate broadly to all employers about the change to employee deductions for child support. This may be bundled with other messages for employers (like negative adjustments). We will create tailored messages for those who already make child support deductions and need to know what's changing, and for those who will be new to it.

Segmentation will be based on the following:

- SME or sole trader, Self-employed, Significant enterprises, Medium to large enterprises that may have multiple profiles.
- EMP filing channel used (eg myIR).
- 1,790 customers who will have historical audit visible in their myIR account + an employee with admin access
- Do they use software?
- Do they currently make employer deductions for child support?
- Their size (no. of employees).
- What they need to know, and when.
- Do they use a tax agent?
- Are they in arrears/debt, are they up to date with their EI?
- Are they a financial institution with obligations around investment income?

4.4.2 Planned activities for businesses

Phase	Activity
Ongoing throughout Release 2	<ul style="list-style-type: none"> • Support BT account management and community compliance activities. • Monthly Business Tax Update articles. High level updates about the changes. Link them through to the landing page for more detail. • Send monthly Transformation Newsletters providing high level updates about the changes and linking them through to the website landing page for more detail.



Phase	Activity
Phase 1: Awareness	<ul style="list-style-type: none"> • New landing page added to IR website (late July - early August). Provide information about the changes to myIR and any legislation that could impact businesses and employers.
Phase 2: Understanding	<ul style="list-style-type: none"> • Direct marketing including emails and letters (mid-September). Tailored for sub-segments. Drive customers to the website for more details about the changes. • Targeted digital advertising (September). High level updates about the changes. Link through to the landing page for more detail. • How to content – videos and/or guides. Provide examples of what's changing and how to do the tasks in V12. Videos could be animated, making them editable if the V12 screens change during Phase 2. • Short webinars on using V12 for those topics not covered in the videos. • Quick reference summaries to accompany the webinars. • As we get closer to go live this content would move to the website and quick reference guides would likely become 'task pages'. • Support packages (webinars and summaries) for Community Compliance.
Phase 3: Support	<ul style="list-style-type: none"> • Updated landing page and topic webpages (after go-live). Provide information about the changes to myIR and any legislation that impacts them. Include 'how to' information through videos or task pages. • Direct marketing including emails and letters (after go-live). Tailored for sub-segments. Drive customers to the website for more details. Include Day 1 packs. • Contextual guidance on the web. Depending on need, as identified during customer testing, if the contextual guidance approach is approved, we will provide and promote these guidance assets to our business customers. • Canvas key groups on any missing information that we can produce webinars or web content on, continuing post go-live. • Social media to highlight key milestones and link to relevant how to videos ie 'How to file GST' in myIR targeting those with a 28 October due date.

4.4.3 Key messages

Draft key messages:



- In October, you'll notice some changes to myIR. For example, the new layout will make it easier to see important information and navigate common tasks.
- Changes to the child support legislation mean that when we go live with the change in October, child support payments will be deducted from a newly liable employee's income if they earn salary and wages.
- In some cases, you may be able to enter a negative value in an EI (Employment Information) file when accounting for adjustments for a prior period.
- For businesses owners who will have historic audit correspondence visible in myIR – From October 2021 some audit letters from 2017 onwards will be moved to myIR. These will be visible to anyone with administrator access. If you do now want the letters to be viewed, you can change their access to Restricted Administrator here.

4.5 Child support customers

4.5.1 Background

Many child support customers have complex needs that require additional support and reassurance from Inland Revenue.

These customers likely have other tax types and social policy products (eg Income tax, WFF, PPL, SL) and as frequent users of myIR, will be highly impacted by the V12 changes in addition to the child support legislative changes.

The following gives a high-level overview of these customers:

- There are 319,000 total child support customers – 156,000 liable parents and 163,000 receiving carers.
- Some customers are both liable parents and receiving carers.
- There is a mix of formula and voluntary agreements in place. Liable parents pay IR manually or via employer deductions.
- The primary communication channels for these customers when communicating about child support has been phone and paper. With the move of child support into START, we will promote the new self-service functionality within our messaging.

Liable parents:

- 69.8% of child support obligations are paid on time and therefore do not incur penalties.
- NZ\$387 million is received from liable parents in a year – this amounts to 81.5% of the overall assessment collected.
- There is currently \$2.36 billion total outstanding debt. \$1.8 billion is penalty debt – this accounts for 76.3% of the total debt.
- There is \$750 million international debt - \$672 million of this relates to penalties charged.
- Legislation came into effect on 1 April 2021, repealing the child support incremental penalty and simplifying write-off provisions. Note: The Families segment is planning to contact relevant child support customers to write-off historic incremental penalty debt,



prior to the October changes. We are looped in with this team and will provide communications advice and support where appropriate.

- Of total liable parents, 48,200 are on a benefit.

Receiving carers:

- Approximately 37,000 new child support applications were received for the year ending June 2019.
- NZ\$238 million is paid to receiving carers in a year.
- 55,800 receiving carers are on Sole Parent rate of benefit.

4.5.2 *Communications approach*

Working with the Families segment, we will continue to use BAU channels already familiar to child support customers. This includes standard marketing channels such as direct marketing, web content, and digital and social media advertising.

We'll use the information we have available to create sub-segments of child support customers. This will enable us to tailor and target the appropriate messaging ensuring that the right child support customers get the right message at the right time. It will also help us make sure that those who are likely to need the most support will get it.

We will combine messaging around myIR version 12 changes and child support legislative changes so these customers don't get multiple communications.

Community, advocacy and parenting specific groups will be integral in cascading information about child support changes to their members and followers. The approach for communicating with these groups is covered in the above 'Key Influencers' section.

Overall, our messaging for child support customers will need to explain:

- what the changes mean for them, what they need to do and when (reassurance is particularly key for this group).
- what the concurrent myIR V12 changes will mean for them with reassuring tips on how to navigate myIR.
- the value they get from the changes – our tone will need to be informative not authoritative, and we will myth-bust where appropriate.
- how we're here to help them get things right from the start. And how simplifying the child support process does that.

Initial data profiling indicates the below Child Support segmentation will be relevant:

- Child support sub-segments: Liable parent, paying parent or both.
- Child support payment arrangement: Formula, voluntary.
- Child support payment type: direct from liable parent, employer deductions.
- Child support debt: primary debt, penalty debt.
- Child support with other tax types: WfF, PPL, student loan.
- Child support location: New Zealand, overseas.
- Child support benefit: no benefit, benefit.



General indicators we can use to tailor messaging:

- myIR status (active and used recently, active but no recent log ins, no myIR).
- Contact details available (email, postal, mobile).

April 2022 leg changes: the approach for communicating legislative changes which come into effect in April 2022 is out of scope for this plan.

4.5.3 *Planned activity for child support customers*

Phase	Activity
Ongoing throughout Release 2	<ul style="list-style-type: none"> • Support BT account management and community compliance activities. • Send monthly Transformation Newsletters to advocacy groups providing high level updates to community and advocacy groups about the changes and linking them through to the website landing page for more detail.
Phase 1: Awareness	<ul style="list-style-type: none"> • New landing page added to IR website (late July - early August). Provide information about the child support legislation changes and new myIR functionality/look-and-feel - what will impact them, why how and when. • Direct marketing including emails and letters (mid-September). Tailored for sub-segments based on the most highly impacted. Drive customers to the landing page for more detail of the changes. myIR status will drive login/register message and level of detail about upgrade changes. • Digital and social media advertising (launched early-September). Drive customers to the landing page for more detail about the changes. Relevant targeting and tailored messaging for sub-segments. Change messages split and served in biteable chunks ie child support account now available in myIR, we're simplifying child support. • Work closely with the media team as there is likely to be some media interest in the changes, particularly the move to compulsory employer deductions. This could include proactive media and will require the development of reactive Q+As.
Phase 2: Understanding	<ul style="list-style-type: none"> • Updates to the landing page (late September/early October). Update landing page to include additional pre-cutover info. Reiterate the key changes (legislative and myIR) and include any help/how to info. • Direct marketing including emails and letters (mid-October). Continue to drive customers to the landing page for more detail about the changes. Signal cutover info and dates. Identify customers who didn't open the first round of emails or whose email bounced. Resend emails or send letters to make sure they're aware of the changes. Identify specific reasons



Phase	Activity
	<p>customers contacted IR from first round of activity and updates messaging to prevent contacts.</p> <ul style="list-style-type: none"> • Digital and social media advertising (continuing to run throughout October). Continue to drive customers to the landing page for more detail about the changes. Continue with relevant targeting and tailored messaging for sub-segments. Signal cutover information and dates. • Factsheets on the key changes. • Continue to work closely with the media team.
<p>Phase 3: Support</p>	<ul style="list-style-type: none"> • Updates to the landing page (late October/early November and live once system successfully upgraded). Update landing page to include 'changes are here' messaging after cutover weekend. Reiterate what the changes are and encourage myIR self-service. • Direct marketing including emails and letters (mid-November). Remind customers of the changes that will be occurring/have occurred. Continue to drive customers to the landing page for more detail about the changes. Identify customers who didn't open the first two rounds of emails or whose email bounced. Resend emails or send letters to make sure they're aware of the changes. • Digital and social media advertising (continuing to run throughout November). Continue to drive customers to the landing page for more detail about the changes. Continue with relevant targeting and tailored messaging for sub-segments. Update messaging to 'changes are here' after cutover weekend. • Continue to work closely with the media team. • Contextual guidance on the web. Depending on need, as identified during customer testing, if the contextual guidance approach is approved, we will provide and promote these guidance assets to our child support customers.

4.5.4 Key messages

- We're adding a new child support section to myIR which will be available from October 2021. You may also notice that myIR looks a little different.
- You'll be able to update your details and manage your child support account online, including your contact details, bank account details and any changes to your circumstances.
- You will also be able to register for or cancel child support and process administrative review applications and objections in myIR. These changes minimise the number of paper forms you'll need to complete for us in the future.



- We'll be able to pre-populate information we already have on hand for you such as contact and bank account details.
- Currently child support payments (which are received on the 20th of the month) must be paid to you by the 7th of every month. Improvements to our systems will mean that child support payments will be passed on more quickly so you may receive your payments earlier.
- Changes to child support legislation aim to improve fairness, simplify aspects of child support and deliver on Government goals to improve the wellbeing of children. Key changes coming into effect in October include:
 - changes to late payment penalty charges. This includes a grace period during which penalties won't be charged to newly liable (or re-joining) parents and increasing the timeframe before charging the second stage of late payment penalties to 28 days after the due date.
 - changes to some key definitions (ie qualifying age criteria, at which children can be considered financially independent will change to 16 years of age, and the maximum age a child qualifies for child support will change to cease the day before their 19th birthday).
 - the introduction of compulsory employer deductions for newly liable parents.
 - new time constraints for backdating child support assessments.
 - exemptions for:
 - hospital patients
 - those suffering with long term injury or illness
 - overseas prisoners.
- Changes which came into effect on 1 April 2021 include the removal of incremental penalties and the simplification of penalty write-offs.
- These changes all aim to help you get things right from the start.
- Go to our website for more information.
- We'll be in touch soon with more details.

4.6 Individuals and families

4.6.1 Background

The Individuals and Families group includes customers of a number of products eg Income tax, Student Loans, KiwiSaver, Working for Families, Paid Parental Leave and Child Support. As Child Support customers will be impacted both by legislative changes and the move into myIR as well as the overall myIR V12 upgrade, we have separated out our approach for them as an audience. Our approach for the rest of the Individuals and Families groups focuses on the move to myIR V12.

Our Individual and Families customers need an educative and supportive approach to encourage greater interaction with myIR. Families customers in particular drive a large portion of inbound contact on our phone lines due to the complexity of their situations and for some,



low trust in myIR. Providing reassurance at all contact points, whether it's in myIR or in our supporting communications, will be important for this group.

The following gives a high-level overview of these customers:

Individual customers:

- 1.45 million customers in this group.
- Individuals with 1-2 accounts.
- Individuals with accounts such as Income tax and KiwiSaver.
- Low frequency use of myIR – one to ten times per year.
- Generally low confidence in using myIR.
- Compliance attitude is reactive.

Families customers:

- 1.26 million customers in this group.
- Families customers can concurrently be Individuals customers.
- Individuals with social policy accounts such as Working for Families, Child Support or Student Loan.
- Use myIR a few times a month.
- Generally low confidence in using myIR.
- Compliance attitude is reactive.

Tax agents:

- Tax agents will be acting on behalf of some customers and will need to receive communications about the changes on behalf of their clients. This will be taken into account as part of our segmentation and targeting approach.

Student loan credit and debit card transaction fee: The credit and debit card transaction fee of 1.42% which has previously been waived for overseas customers will begin to be passed on to student loan and child support customers using overseas bank cards once we've gone live in October. This is because there are now more (and better) payment channels available to our customers. The convenience fee will be included in our messages about the variety of payment options they can use. It will be included in our web content, child support direct marketing, the bi-annual student loan campaign which takes place in September, and our BT communications channels to community organisations such as webinars and newsletters.

4.6.2 *Communications approach*

We'll use the information we have available to create sub-segments of Individuals and Families customers. This will enable us to tailor and target the appropriate messaging ensuring that the right Individuals and Families customers get the right message at the right time. It will also enable us to make sure that the those who are likely to need the most support (ie complex Families customers) will get it.

Our messaging for these customers will need to focus on:



- creating awareness that things will look different in myIR and being clear about when the changes will occur
- providing guidance on what they might need to do differently once version 12 changes are live
- directing customers to web content where they can find more detailed/step-by-step information about the changes that affect them and how-to self-service
- providing them with top tips on how to navigate and get the most out of myIR, and
- being clear about when cutover will occur and what they need to do before then to be ready.

Initial data profiling indicates the below segmentation will be relevant:

- Individuals sub-segments: Income tax, Student Loan etc, or a mix.
- Families sub segments: Working for Families, Child Support, Paid Parental Leave etc, or a mix.

General indicators we can use to tailor messaging:

- Linked to a tax agent or no tax agent.
- Frequency myIR login: ie 1-2 times per year, 3-12 times per year, 13-36 logins per year, 37+ logins per year.
- Confidence in using myIR: low, medium, high.
- Compliance attitude: proactive, reactive.
- Contact details available (email, postal, mobile).
- Nominated persons (NOP) or alternative contact persons (ACP).

4.6.3 *Planned activities for individuals and families*

Phase	Activity
Ongoing throughout Release 2	<ul style="list-style-type: none"> • Send monthly Transformation Newsletters to community organisations / advocacy groups for changes that impact individuals and families. • Support BT account management and community compliance activities for advocacy groups that reach individuals and families.
Phase 1: Awareness	<ul style="list-style-type: none"> • New landing page added to IR website (late August - early September). Provide information about the changes to myIR and any leg that could impact them. • Direct marketing including emails and letters (mid-September). Drive customers to the landing page for more detail about the changes. Tailored for sub-segments to outline relevant key changes myIR status will drive login/register



Phase	Activity
	<p>message and level of detail about upgrade changes. Email/letter sent to tax agents for those linked to an agent.</p> <ul style="list-style-type: none"> • Light touch digital and social media advertising (early mid-September). Drive customers to the landing page for more detail about the changes. Relevant targeting and tailored messaging for sub-segments. Change messages high-level and served in bite-size chunks ie Changes are coming for myIR in October, myIR will look a little different etc.
<p>Phase 2: Understanding</p>	<ul style="list-style-type: none"> • Updates to the landing page (late September/early October). Update landing page to include additional pre-cutover information. Reiterate the key changes (legislative and myIR) and include any help/how to info. • Direct marketing including emails and letters (mid-October). Continue to drive customers to the landing page for more detail about the changes. Signal cutover info and dates. Identify customers who didn't open the first round of emails or whose email bounced. Resend emails or send letters to make sure they're aware of the changes. Identify specific reasons customers contacted IR from first round of activity and updates messaging to prevent contacts. • Digital and social media advertising (continuing to run throughout October). Continue to drive customers to the landing page for more detail about the changes. Continue with relevant targeting and tailored messaging for sub-segments. Signal cutover info and dates.
<p>Phase 3: Support</p>	<ul style="list-style-type: none"> • Updates to the landing page (after go-live) and live once system successfully upgraded. Update landing page to include 'changes are here' messaging after cutover weekend. Reiterate what the changes are and encourage myIR self-service. • Direct marketing including emails and letters (mid-late October depending on cutover date). Further 'how to', if required. Remind customers of the changes that will be occurring/have occurred. Provide additional 'how to' information to help them get used to the changes. Continue to drive customers to the landing page for more detail about the changes. • Digital and social media advertising (continuing to run throughout October-November). Continue to drive customers to the landing page for more detail about the changes. Continue with relevant targeting and tailored messaging for sub-segments. Update messaging to 'changes are here' after cutover weekend. • Contextual guidance on the web. Depending on need, as identified during customer testing, if the contextual guidance



Phase	Activity
	<p>approach is approved, we will provide and promote these guidance assets to our individuals and families customers.</p>

4.6.4 *Key messages*

- From October you'll notice some changes to myIR. The new layout will make it easier for you to see important information and there will be more functionality for certain tasks.
- You'll be able to use myIR across different devices – whether you're using a phone, tablet or desktop, myIR will be presented in a way that adapts to your screen size. We will emphasise this enhancement to those who currently log on to myIR using mobile devices.
- The new functionality will allow you to access most of the actions you need to perform either from the homepage or once you've clicked into a product account panel ie Income tax.
- The current account (product) tiles will become account panels and you'll be able to scroll down through these with useful information about your accounts such as any 'due now' balances and relevant quick links to "make a payment" or "file a return". This will make it easier for you to focus on the most relevant and important information and will more clearly highlight what actions we want you to take, when and how.
- A new 'Action' centre on the myIR homepage will allow you to access all your alerts, separated out by account type and due date. You'll have the ability to dismiss alerts if you'd like to.
- These changes will make navigating myIR simpler and easier. The new functionality will provide you with more reassurance about what actions we want you to take and when, helping you get it right from the start.
- Go to our website for more information.
- We'll be in touch soon with more details.



Appendix A: High-level tactical plan

<div style="display: flex; flex-direction: column; gap: 5px;"> <div style="display: flex; align-items: center; gap: 5px;"> BT Communications led</div> <div style="display: flex; align-items: center; gap: 5px;"> Marketing led</div> </div>	Readiness							
	Awareness				Understanding		Support	
	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov
Minister reports / briefings								
Account Management / F2F			Intro to S4.R2 pack					
Webinars			Intro to Release 2 V12 Orientation	V12 Warming up – filing, viewing and amending returns	V12 Managing accounts, profiles, payments and communications Child support legislation	V12 Child support Child support legislation Release 2 tax on income and other	V12 Getting ready for go-live and GST filing V12 Automatic income assessments (tbc – or wait until 2022) <i>Retire older webinars as they are replaced by web content and task pages.</i>	Taking requests
Quick reference summary packs and factsheets			2-page summary pack of each webinar	2-page summary pack of each webinar	2-page summary pack of each webinar	2-page summary pack of each webinar Child support factsheet for community orgs: translated (eg Te Reo and Pacific Island languages).	Once V12 finalised, actual QRGs / task pages MP Packs: Child Support; V12; Other	
ComCom support package				ComCom Q&A sessions (eg monthly to cover webinar content). Webinars and summary packs will be ongoing tools for ComCom.				
V12 self-service contextual guidance (tbc) - with digital team						may include click-stream videos and screen sequence guidance (www). Links from myIR to these assets where appropriate.		
Website (web team involved early)		Business Transformation web page update	Webinar page update	Landing pages Webinar page update	Landing pages Webinar page update	Landing pages Webinar page update	Landing pages / 'Proper' web content	Landing pages
Videos					Accessed from the web landing pages			
Direct marketing				Push people to web landing pages				



Appendix A: High-level tactical plan (contd.)

	Awareness				Readiness			
	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov
<div style="display: flex; align-items: center;"> <div style="width: 15px; height: 15px; background-color: #d9c89d; margin-right: 5px;"></div> BT Communications led </div> <div style="display: flex; align-items: center;"> <div style="width: 15px; height: 15px; background-color: #99e1f3; margin-right: 5px;"></div> Marketing led </div>								
Presentations and demonstrations		TBD						
Articles and content (industry and community bodies)					Start summarising the webinar content			
Transformation News		Introduction to S4.R2 incl. credit card fees web content	Push people towards the webinars and landing pages					
Targeted updates	As required							
Top solutions				As required				
Monthly tax agent update		CS Leg	Push people to web landing pages and webinars					
Agents Answers		CS Leg	Push people to web landing pages and webinars					
Biz.Govt		Push people to web landing pages and webinars						
Social media					Timely announcements and push people to landing pages			
Advertising					Working with agency to make timely announcements and push people to landing pages			
Media	As required							
Front of house screens				Push people to web landing pages				
Voice channel				Push people to wen landing pages				



Appendix B: Results and measurement for customer engagement

Objective/target	Measurement tool	Who
The majority of child support customers (both liable parents and receiving carers) are aware of and ready for the child support legislative changes and myIR version 12 changes. This also includes ensuring that newly liable parents and their employers are aware of compulsory employer deductions coming into effect.	TBC Change Team	Marketing CIE
The majority of individuals and families are aware of and ready for the myIR version 12 changes affecting them.	TBC Change Team	Marketing CIE
The majority of businesses and intermediaries are aware of and ready for the myIR version 12 changes affecting them, and for employers, the new compulsory employer deductions that may affect them.	TBC Change Team	Marketing CIE
The majority of key influencers (such as professional bodies and advocacy groups) are aware of the legislative changes (particularly child support) and myIR version 12 changes that affect their stakeholders/customers.	TBC Change Team	BT Comms BT Account Managers External Relationships
The majority of Government stakeholders are aware of and ready for the legislative changes (particularly child support) and myIR version 12 changes that affect their departments.	TBC Change Team	BT Comms BT Account Managers External Relationships
Campaign landing pages.	Unique visits Average time on page	Marketing (Google Analytics)
myIR activity.	Registrations Logins Uptake of new features	Marketing CIE
Advertising.	Impressions Reach Engagements Clicks Click-through-rate Cost-per-click	Marketing (from ad agency)
Direct marketing (emails, letters, Texts).	Volumes sent Opens and Open rate	Marketing (from mail house)
Videos.	Total views Total watch time Retention rate Completion rate	Marketing



Appendix C: Communications Channels

As with previous releases, we will employ a range of channels and tactics to reach each stakeholder group. The following table details the key channels we will use.

Tactic	Description	Delivered by
Reports and briefings	Regular reports to ministers, Cabinet and MPs. Includes MP packs prior to cutover to inform them of potential impacts for their constituents.	BT Communications
Partner agencies	Using established contacts and forums to work with partner agencies.	BT Account Managers (supported by BT Communications), Community Compliance
Face to face	Supporting the BT and BT/Community Compliance Account Managers with messaging and collateral for their face to face stakeholder engagement.	BT Communications
Presentations and demonstrations	Providing presentations and collateral for conferences and seminars (eg for BT Account Managers). These will include V12 demonstrations. COVID restrictions may continue to mean fewer face to face conferences and seminars during Release 2.	BT Communications
Webinars	Targeted and subject specific. For V12, webinars are likely to be bite-sized previews of what's changing. As Release 2 designs are completed, these may become more demonstration style videos and/or web task pages. Webinars may be accompanied by quick reference summary sheets.	BT Communications
Articles	Articles for industry publications including industry journals, magazines and newspapers.	BT Communications
Content	Providing consistent content for stakeholders to use in their communications to staff and end users. This includes for tax intermediaries, software developers, industry bodies, professional associations, Māori organisations and community groups.	BT Communications



Tactic	Description	Delivered by
Transformation news	A monthly newsletter for subscribed external stakeholders.	BT Communications
Targeted updates and factsheets	Targeted news and factsheets for specific groups. Either subject or audience specific, timed for when they need to know.	BT Communications
Top solutions	Web pages providing updates on issues, their resolution and other important and timely information for tax intermediaries and businesses.	Marketing Content Team BT Communications
Monthly tax agent updates	A brief update to tax intermediaries on changes that impact them, issue updates and links to further information on Top Solutions and other web pages.	Marketing (lead)
Agents Answers	Articles on upcoming changes that will impact tax intermediaries.	Marketing (lead) BT Communications Communicating with Customers Team (own)
[INFORMATION REDACTED] Newsletter (Biz.Gov)	Articles on upcoming changes that will impact employers.	Marketing (lead) Communicating with Customers Team (own)
Direct to customer	Tailored and timely emails, letters and texts to inform customers about the relevant Stage 4 changes. Includes links to more information on the website/ landing pages.	Marketing
Videos	Short videos on the changes, to support direct mailings.	Marketing
Quick Reference Guides	Short, printable step-by-step guides on specific tasks, to support direct mailings.	Marketing
Social media – posts to page	Using IR’s channels to raise awareness, create engagement, link to the relevant pages and answer customer questions.	Marketing
Website	Landing pages, home page promo tiles as required. With links to more information (permanent content pages/guides/task pages) as appropriate.	Change Team (lead) Communicating with Customers Team (own)



Tactic	Description	Delivered by
	Relevant landing pages and permanent pages to be promoted via the other tactics mentioned in this table.	Marketing (lead R2 landing pages) Marketing and BT Communications (review and contribute)
Contextual guidance for myIR	If approved this may include video and guidance assets that can be accessed on our website or, for tax intermediary 'hotspots', directly as a link from certain pages in myIR.	Marketing Digital Services
Front of house screens	Updated to match the advertising messaging. Will include links to the relevant landing pages or permanent webpages.	Marketing
Media	Supporting proactive media releases and media briefings, as appropriate, to clarify information, myth bust, or to promote positive messages.	IR Media team (lead) BT Communications
Voice channel	Targeted and timely messages about upcoming changes for those who call IR.	



Appendix D: Key messages

External stakeholder group	Audience	Key messages	Key channels
Government		<ul style="list-style-type: none"> • Overview of the major changes for Stage 4, Release 2 - START Delivery. • Progress and timing for implementing legislative change; aligned messaging on the passage of relevant legislation. • Updates on product and V12 progress. • Updates on interactions with other key agencies. • Positive social impacts as well as potentially negative perceptions and reporting (no surprises). • Aligned messaging on COVID-19 initiatives. 	<ul style="list-style-type: none"> • Weekly and monthly meetings with Commissioner, DC Transformation, DC Policy and Strategy. • Reports and Briefing notes including Cabinet Papers. • Monthly Joint Ministers Report. • IR Quarterly and Annual Reports, Statement of Intent, Four Year Plan. • Six-monthly Transformation updates. • Reports from other Government agencies. • Formal and informal contact with key stakeholder groups. • Bi-monthly central agencies meeting.
		<ul style="list-style-type: none"> • Overview of the major changes. • Progress and timing for implementing legislative change. • Updates on product and V12 progress. • Updates on interactions with other key agencies. • Positive social impacts; negative perceptions and reporting (no surprises). • COVID-19 initiatives. 	<ul style="list-style-type: none"> • Cabinet Papers. • Six-monthly Transformation updates. • Input into FEC process. • Reports from other Government agencies. • Contact with key stakeholder groups. • External newsletters. • Publication of key Programme documentation.



External stakeholder group	Audience	Key messages	Key channels
	Information redacted	<ul style="list-style-type: none"> • Overview of the major changes that may impact their constituents. • Progress and timing for implementing legislative change. • Positive social impacts and how we are mitigating perceived risks. • COVID-19 initiatives. 	<ul style="list-style-type: none"> • FEC briefings. • Programme 'product' and V12 fact sheets and updates eg cutover dates.
	Information redacted	<ul style="list-style-type: none"> • How the changes impact their processes, staff and customers. • Key messages to support their role as advocates of key changes. • Positive social impacts as well as potentially negative perceptions and reporting (no surprises) for the products they are involved with. • Support communications for their customers as part of policy change where applicable. 	<ul style="list-style-type: none"> • Co-design where applicable. • Better Public Services Steering Group meetings. • Regular meetings between Communication and Stakeholder leads. • Cross Agency open home. • Direct channels with agency representatives (supported by BT Account Manager and product owner).
	Other government departments and agencies	<ul style="list-style-type: none"> • Specific changes for their customers and their role in communicating these. • Content they will be required to change (eg web content). • Updates around processes, specifically child support. • Changes for employers. 	<ul style="list-style-type: none"> • Regular meetings with business.govt.nz team. • Agreed common work programme. • Newsletter content. • BT Account Management team.
	Information redacted	<ul style="list-style-type: none"> • Changes for their processes. 	<ul style="list-style-type: none"> • Existing Relationship Managers.



External stakeholder group	Audience	Key messages	Key channels
		<ul style="list-style-type: none"> • Key messages and communications approaches. • Support communications to their customers as part of policy change where applicable. 	<ul style="list-style-type: none"> • BT Account Management.
Key influencers	Transformation Reference Group	<ul style="list-style-type: none"> • Progress updates and plans. 	<ul style="list-style-type: none"> • Meetings. • Presentations.
	Professional bodies/associations and Tax Agent Cohort	<ul style="list-style-type: none"> • Progress updates and plans (most products) ahead of their members / customers. 	<ul style="list-style-type: none"> • Relationship Managers. • Meetings. • Presentations. • Targeted updates.
	National media and main city-based publications	<ul style="list-style-type: none"> • Recap of transformation messaging and why it is necessary. • Key messages around START Stage 4, Release 2 changes. • Transitioning from BT to BAU. • FAQs and prepared messages for topics of interest such as child support. 	<ul style="list-style-type: none"> • Publication of key programme documentation. • Back pocket notes for CIR and DCs. • FAQs and reactive statements. • Website.
	Regional press, trade and business publications	<ul style="list-style-type: none"> • Understand transformation and why it is necessary. • Key messages around START Delivery, Release 2 changes specific to interest groups. • Transitioning from BT to BAU. 	<ul style="list-style-type: none"> • Publication of key programme documentation. • Media portal. • Website. • Proactive trade and community media relations (BT Comms). • Targeted press releases. • FAQs and reactive statements.



External stakeholder group	Audience	Key messages	Key channels
	Media commentators	<ul style="list-style-type: none"> Understand transformation and why it is necessary. Key messages around START changes specific to areas of interest. Transitioning from BT to BAU. FAQs and prepared messages for topics of interest such as child support. 	<ul style="list-style-type: none"> Publication of key programme documentation. Media portal. Website. FAQs and reactive statements.
	Advocacy groups. Community, beneficiary and business advocacy groups, budgeting services. Parenting specific groups	<ul style="list-style-type: none"> Messaging around the changes proposed to child support including small changes for employers. The V12 upgrade – why we are doing it, the improvements and how to navigate and use the new myIR. Content that they can share with members. Where people can find more information. 	<ul style="list-style-type: none"> BT Account Managers. Community Compliance. Factsheets and other collateral and content for sharing. Social media. FAQs.
Customers	Individuals: <ul style="list-style-type: none"> Families High Net Worth Individuals Māori and Pasifika Other Individuals 	<i>Version 12 customers</i> <ul style="list-style-type: none"> The V12 upgrade – why we are doing it and how the upgrade helps them. Information on how to navigate and use the new myIR. Encourage greater use of digital channels. <i>Child support customers</i> <ul style="list-style-type: none"> What is changing for child support – including payment timing. 	<i>Version 12 and child support customers</i> <ul style="list-style-type: none"> In conjunction with marketing. Existing Marketing and Communications channels including media and social media. Advertising campaigns, PR, media and social media. Website, webinars and Seminars. 'At source' comms on myIR. Consumer interest and advocacy groups (including content for their publications).



External stakeholder group	Audience	Key messages	Key channels
		<ul style="list-style-type: none"> • Messaging to mitigate potential negative public sentiment. • How to apply for child support online. <p><i>Child support customers receiving a benefit</i></p> <ul style="list-style-type: none"> • What the changes are and how it impacts them. • What to expect for their child support payments. • Know where to go for more information. 	<ul style="list-style-type: none"> • Account Managers (where applicable). • Community Compliance. • BT Account Management team. <p><i>Child support customers receiving a benefit</i></p>
Customers	Business: <ul style="list-style-type: none"> • Microbusiness • Not for Profit • Significant Enterprises • Small to Medium Enterprises 	<p><i>All</i></p> <ul style="list-style-type: none"> • What the changes are, how they are impacted and what they need to do. • Child support deductions for newly liable customers. <p><i>Version 12 customers</i></p> <ul style="list-style-type: none"> • The improvements to myIR and how they navigate / use it. • Encouraging the use of digital channels, and how to do this. • How to get the most out of the system and how it helps them. 	<ul style="list-style-type: none"> • Chambers of commerce and industry organisations. • Tax agents. • Website. • Existing Marketing and Communications channels. • BT Account Management team. • Account Managers. • Community Compliance. • Webinars and seminars. • Corporate Taxpayers Group. • Business associations. • Communications from tax intermediaries and advisers. • Media coverage.



External stakeholder group	Audience	Key messages	Key channels
Service providers and partners	Intermediaries, Tax Agents, Financial advice/support groups, Bookkeepers and Payroll Bureaux, Representatives, Nominated Persons	<p><i>Overall</i></p> <ul style="list-style-type: none"> Detailed messaging on the specific changes that impact them and what they need to support their clients. <p><i>Version 12</i></p> <ul style="list-style-type: none"> Educative 'how to' communications for completing tasks in the new interface. Messaging about the positive aspects of V12. What they see vs what the customer sees. Messaging to support engagement, consultation and co-design activities. 	<ul style="list-style-type: none"> Engagement with tax agent groups – conferences etc. Existing marketing and communications channels for these groups. Communication from industry groups. BT Account Management team. Tax Agent Cohort. Community Compliance. Targeted updates. Webinars and seminars.
	Software developers	<p><i>General</i></p> <ul style="list-style-type: none"> Supporting communications about Stage 4 changes that impact software developers. 	<ul style="list-style-type: none"> BT Account Management team. IR Digital Twitter followers. DES workshops.
	Payroll Software Developers	<p><i>General</i></p> <ul style="list-style-type: none"> Supporting communications about Stage 4 changes that impact software developers. <p><i>Tax on income</i></p> <ul style="list-style-type: none"> Any changes required to cater for negative adjustments. 	<ul style="list-style-type: none"> BT Account Management team. IR Digital Twitter followers. DES workshops.
	Tax Pooling intermediaries	<ul style="list-style-type: none"> Inform them about changes. 	<ul style="list-style-type: none"> Webinars. Industry associations. Website. BT Account Management team.



External stakeholder group	Audience	Key messages	Key channels
			<ul style="list-style-type: none"> • Community Compliance. • Existing Marketing channels.
	Financial Institutions	<p><i>General</i></p> <ul style="list-style-type: none"> • What the changes are, how they are impacted and what they need to do. • Changes as employers (including child support deductions). <p><i>Version 12</i></p> <ul style="list-style-type: none"> • The improvements to myIR and how they navigate / use it. • Encouraging the use of digital channels, and how to do this. • How to get the most out of the system and how it helps them. <p><i>Other</i></p> <ul style="list-style-type: none"> • Any tax on income impacts. • Align with 'in-flight' communications such as RWT rate changes in October and the mandatory move to payday version 2. 	<ul style="list-style-type: none"> • Bankers Institute. • Website. • Marketing and Communications channels. • BT Account Management team. • Community Compliance. • Webinars. • Communications from tax intermediaries and advisers. • Media coverage.



External stakeholder group	Audience	Key messages	Key channels
	KiwiSaver Providers	<ul style="list-style-type: none"> • The changes to the new Gateways Services APIs and what they need to do to. • The upgrade to V12 and how it impacts them. 	<ul style="list-style-type: none"> • Business Lifecycle Managers (SE). • Marketing and communications channels. • Newsletters. • Industry groups. • Webinars. • BT Account Management team.