



Inland Revenue

Business Transformation Programme

Stakeholder Engagement Plan for BT Stage 4 START Delivery

Senior Responsible Owner

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Date:

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About this document

The high-level Stakeholder Engagement Plan will identify and document the strategy and approach for building and maintaining internal and external stakeholder understanding of and support for START Delivery change, part of Business Transformation Stage 4. The document will be refreshed following the second, more detailed impact assessment and will be included in Deliverable D4239 Customer, Stakeholder and Marketing Plan for Stage 4 START Delivery.

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<p>The following people/groups have been informed of the development and completion of this document</p>	<ul style="list-style-type: none"> • PLT • Future Operation Model Lead • Business Integration Lead CCS • Relevant Segment Leads 		



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1 Executive Summary

Business Transformation (BT) is a multi-year, multi-stage change programme which will help IR become the modern world-class revenue organisation which is set out in its vision: *IR for the Future*.

Stage 4¹ will see the completion of the future revenue system. It is the final stage of IR's transformation journey and will conclude in early 2022 at which point the Business Transformation programme will end. In this time, we will look to transition the knowledge, practises and processes we have developed to support both internal and external stakeholders, into the business progressively. How this happens ties into the way the organisation is set up for the future, with ongoing work on our future operating model in conjunction with He Kōtuitui.

1.1 Stage 4 will be completed in five workstreams

Stage 4 will be completed in five workstreams:

1.1.1 Workstream 1 – START Delivery.

This is made up of three key areas:

- A. Core Completion Delivery: Moving all remaining tax and social policy products into START (Child Support, Paid Parental Leave, Foreign Trusts, Duties and Unclaimed Monies) and upgrading START and myIR to Version 12.
- B. New Legislation Delivery: Implementing any new policy into the tax and social policy system.
- C. Optimisation Delivery. Improvement of products and services already in START in full partnership with the business and in consultation with external customers where appropriate. This work will go through a prioritisation process and while important, will be lower priority than workstreams A and B.

1.1.2 Workstream 2 – Technology Landscape Optimisation (TLO).

1.1.3 Workstream 3 – Intel led (IL).

1.1.4 Workstream 4 – Enterprise Support Services (ESS).

1.1.5 Workstream 5 – Transition and Business Integration (T&BI).

This Stakeholder Engagement Plan identifies and documents at a high-level the strategy and approach for building and maintaining internal and external stakeholder understanding of, and support for, START Delivery (Workstream 1). For a more detailed view of the BT external stakeholder management approach, this Stakeholder Engagement Plan should also be read in conjunction with the BT Account Management Strategies (scheduled for completion by the end of September).

¹ See *Appendix 1* for a detailed diagram of Stage 4 Scope

1.2 Strategic engagement for our Stakeholders

Effective communication and engagement with a complex array of stakeholders is critical to the success of the transformation within IR, and a key construct of achieving the transformation goal of making it simpler, more open and certain for New Zealanders to pay their taxes and receive their entitlements.

Stage 4 START Delivery has a critical dependency on successfully engaging internal and external stakeholders, both existing and new to the Business Transformation Programme.

This includes stakeholders BT has been engaging with to varying degrees since Stage 1 of Business Transformation, for example, the majority of CCS teams within the organisation, and tax intermediaries, software developers and businesses outside IR; as well as stakeholders who have had less interaction with to the BT Programme who are connected specifically with the final products being moved into START. These include, for example, Trustee Companies for Foreign Trusts and Oranga Tamariki for Child Support.

1.3 Strategic considerations

When developing this strategy, we took into account a number of considerations illustrating the landscape of START Delivery:

- We know most of our stakeholders, and they know us.
- START Delivery affects new stakeholders, as well as existing stakeholders in different ways.
- We have effective, well established account and relationship management teams.
- IR has established Areas of Focus teams in areas of highest risk and change impact and BT is an integral part of these teams.
- We engage and collaborate with the business to achieve successful outcomes.
- We acknowledge all the IR change our customers may be facing.
- BT communications channels are well developed and fit for purpose.
- We are agile and ready to respond to legislation changes and the impacts of COVID-19.

1.4 Stakeholder engagement strategy

The above considerations identify some critical elements for success for START Delivery stakeholder engagement. Our strategy is to:

- **Use what we know works.** We will continue to develop BT's established engagement methodologies, relationships, processes and channels, particularly for the many stakeholder groups that are familiar with BT change.
- **Engage effectively with new stakeholders.** We will build our understanding and adapt our approach to meet the needs of our new stakeholder groups.
- **Help our people be ambassadors of change.** We will build a deeper understanding of the change with our people first and equip them to help our customers.
- **Taking a whole of IR view when engaging with stakeholders.** Acknowledging there are benefits and impacts which sit outside of BT change.

- **Be ready to understand, act and adapt.** Environmental impacts beyond our control may affect the effectiveness of our engagement. We will be prepared to recognise these impacts, understand them and act quickly in response.



2 Background

2.1 About Inland Revenue

Inland Revenue (IR) is an organisation of over 5,000 people located in 17 towns and cities across New Zealand.

In the 2018-2019 period, IR collected \$79.5 billion of revenue which is 80% of the revenue required by the New Zealand government to fund our country.

IR also paid \$4.1 billion in Working for Families Tax Credits, KiwiSaver (via scheme providers), paid parental leave payments and payroll subsidies.

We collected \$471 million in Child Support and passed on \$290 million to carers (the difference retained to offset costs of benefits).

2.2 About Business Transformation

Business Transformation (BT) is a multi-year, multi-stage change programme which will help IR become the modern world-class revenue organisation that is set out in IR's vision *IR for the Future*.

The transformation will change IR to make it simpler, more open and certain for New Zealanders to pay their taxes and receive their entitlements.

The programme's objectives are:

- Improving agility so policy changes can be made in a timely and cost-effective manner.
- Delivering new and more effective services to improve customer compliance and help support the outcomes of social policies.
- Improving productivity and reducing the cost of providing our services.
- Improving the customer experience by making it easier and simpler for our taxation and social policy customers, focused on enhanced digital provision of services.
- Increasing the secure sharing of intelligence and information to improve delivery of services to New Zealanders and improve public sector performance.
- Minimising the risk of protracted system outages and intermittent systems failure.

The programme replaces the FIRST core tax and social policy system with START. It also enables other significant shifts including changes to the organisation model, the introduction of supporting technology and a review of policy and legislative settings to frame and support the programme's objectives.

2.3 Business Transformation progress to date

As at June 2020, the following has been delivered:

1. **Business Transformation Stage 1:** Stage 1 delivered GST and other functions into START including Case manager and Customer Interaction Manager, making GST easier for customers and making the management of GST simpler and faster for IR and the government.
2. **Business Transformation Release 2:** Release 2 delivered the Accounting Income Method (AIM), Voluntary Payday Filing, Withholding taxes, Fringe Benefits Taxes, Gaming Machine Duty, EMS information collection and imaging correspondence.

3. **Business Transformation Release 3:** Release 3 moved Income tax, donation tax credits, Working for Families tax credits and the Customer Master from FIRST to START. It also included new approaches to meeting tax obligations and paying tax, including automatic income tax assessments for individuals. Payday filing (voluntary in R2) became compulsory.
4. **Business Transformation Release 4:** Release 4 moved Student Loans, KiwiSaver and the end-to-end processing of employer obligations (PAYE) into START and implemented a number of enhancements to Income tax and Working for Families.
5. **Organisation design:** In parallel with this activity BT has supported IR through significant change, resulting in more effective ways of working and bringing our people closer to our customers. Although organisation design is still ongoing, it has now been handed to the business for completion.
6. **Intelligence-Led:** This project will deliver the Data and Intelligence Platform, Stax (enterprise records management system), and the Intelligent Information Project (including guided help, enterprise search and intranet). This is to be delivered in stages through to September 2021.
7. **Ātea:** Ātea, IR's new enterprise support services system has been implemented with subsequent updates due over 2020.

2.4 Changes due to COVID-19

In late May 2020, changes were made to the scope and timings of the final stage of the programme to accommodate the impact of the COVID-19 pandemic.



3 Stage 4 Scope

3.1 Stage 4 Scope and Workstreams

Stage 4² will see the completion of the future revenue system. It is the final stage of IR's transformation journey and will conclude in early 2022 at which point the Business Transformation programme will end. In that time, we will look to transition the knowledge, practises and processes we have developed to support both internal and external stakeholders, into the business progressively. How this happens ties into the way the organisation is set up for the future, with ongoing work on our future operating model in conjunction with He Kōtuitui.

Stage 4 will be completed in five workstreams:

Workstream 1 – START Delivery:

This is made up of three key areas:

- A. Core Completion Delivery: Moving all remaining tax and social policy products into START (Child Support, Paid Parental Leave, Foreign Trusts, Duties and Unclaimed Monies) and upgrading START and myIR to Version 12.
- B. New Legislation Delivery: Implementing any new policy into the tax and social policy system.
- C. Optimisation Delivery: Improvement of products and services already in START in full partnership with the business. While important, this work will go through a prioritisation process and will be lower priority than workstreams A and B.

Workstream 2 – Technology Landscape Optimisation (TLO): Decommissioning and archiving of non-enduring heritage services and a programme of work to ensure that technology environments are simplified, enduring, and sustainable to operate.

Workstream 3 – Intel led (IL): The Intelligence Led programme will continue working to bring together two distinct programmes of work – data and analytics and information and knowledge management – into one cohesive eco-system.

Workstream 4 – Enterprise Support Services (ESS): This will bring more information and functionality into Ātea over the next year.

Workstream 5 – Transition and Business Integration (T&BI): This workstream will focus on the support and transition of our knowledge, methods, practices, and processes back to the business, to enable the programme to wind down and the business to progressively take on the responsibility for delivering change.

² See *Appendix 1* for a detailed diagram of Stage 4 Scope



3.2 START Delivery

In early 2021, move into START:

- **Paid Parental Leave:** Moving Paid Parental Leave into START will bring about the following key changes:
 - PPL being in the same system as all other products, rather than a standalone system.
 - Wider range of staff will be able to work on PPL.
 - Removal of the paper application and replaced with a digital channel, with a phone channel for those that don't have access to the internet. Customers able to submit applications and update their circumstances via digital channels.
 - It will also allow automated processing of applications, disbursements and will consider IR's role in prevention of overpayments.

Note: regulation changes are required to enable the significant shift we look to deliver for PPL when it is moved into START.

In 2019, IR made \$367 million in payments to 66,923 parents.

- **New Zealand Foreign Trusts:** The move to START will allow digital channels for receiving, storing, managing and distributing information and payments as well as enhancing validations to improve data quality and reduce manual handling. As at October 2019 there were 2,991 active trusts.
- **Duties:** The move to START will enable digital channels for receiving and distributing information and money as well as changes to allow for automated processing of returns, payments, P&I, credit offsetting, disbursements and reconciliations. In 2019, payments totalled approximately \$115 million.
- **Unclaimed Monies:** The move to START will deliver legislative changes to improve aspects of the holder and owner processes such as enhancing information matching to locate owners, allow third party authority to make claims and introduce a 60-year time limit for claims. Further changes include improving compliance for organisations through online service options, providing an online claimant process and automated website list updating holder payments and claimant refund transactions. The database and spreadsheets currently hold more than 500,000 entries worth approximately \$214 million.

In October 2021 move into START:

- **Child Support:** Moving Child Support into START will modernise and improve information sharing, online services and self-management tools, and deliver straight-through processing with fewer manual interventions, automating large transactional processes and providing a better integration of International Child Support into core systems. It will also deliver legislative changes to improve fairness, simplify aspects of the scheme, improve compliance and deliver on Government goals to improve the wellbeing of children.

It may include changes that affect some individuals, such as requiring some to start

paying child support directly via their employer. Note that in 2019, IR collected \$471 million from more than 164,000 parents who pay child support.

- **Upgrade START and myIR to Version 12:** The changes will include better functionality, enhanced security, a different navigational structure and a new look and feel. The changes will likely have a medium-high impact for customer facing staff and will be a big change for most customers and especially tax agents.

3.3 New Legislation Delivery

This area of focus will allow us to:

- Dedicate resource to ensure we can assist, as needed, to support the Government's COVID-19 response.
- Implement legislative changes we may need for the CORE START products, along with Budget initiatives, such as annual returns.

The items in this stream are considered **must dos** and will be prioritised over optimisation tasks.

3.4 Optimisation

This area of focus is about transitioning the change processes and methods to IR's business units with a focus on optimising products and processes already delivered by BT, for example Tax on Income, Working for Families, KiwiSaver, Student Loans and GST. The combined BT and BAU leads will develop the prioritisation approach and model that IR will use post BT and also test the processes and model during the final stage of BT by selecting high value groups of changes that deliver on operational efficiencies and improved customer outcomes.



4 Structure of Stakeholder Engagement and Planning documents

This Stakeholder Engagement Plan identifies and documents the strategy and approach for building and maintaining internal and external stakeholder understanding of and support for START Delivery (Workstream 1), covering the period June 2020 – December 2021.

Stakeholders are defined as groups or individuals who are impacted by, or will impact on, the implementation of Stage 4 START Delivery.

4.1 Stage 4 Planning documents

More detailed planning documents for Stage 4 are below:

Stakeholder Engagement for Business Transformation Stage 4		
Workstream	Details	Owner
Workstream 1: START Product Delivery	Stakeholder Engagement Plan for START Delivery (Stage 4) (this document) Internal Communications Plan	BT Communications in collaboration with the business
	Customer, Stakeholder and Marketing Plan	BT Communications in collaboration with Marketing and Communications, and the business
Workstream 2: Technology Landscape Optimisation	Organisation Impact Assessment, Change, Stakeholder and Communications Plan for Decommissioning and Archiving Organisation Impact Assessment, Change, Stakeholder and Communications Plan for Technology Landscape Optimisation	BT OCMT in conjunction with BT Communications
Workstream 3: Intel-Led	Intelligence Led – Incremental Communications plans	BT Communications in conjunction with IIS Communications
Workstream 4: Enterprise Support Services	ESS Release Change and Communications plans	BT Communications for ESS programme
Workstream 5: Transition and Business Integration	Plan name (TBC)	Plan owner (TBC)



5 Environment

Key internal and external environmental factors that will influence the way we communicate are listed below:

5.1 Internal environment

Strengths	Weaknesses
<ul style="list-style-type: none"> • BT change and communications processes and tactics are well embedded and engaged with by IR people. <ul style="list-style-type: none"> ○ There are high levels of internal awareness of BT. ○ The roll out experience is well understood and planned for – the milestones for change management are well understood and expected by the business. ○ Teams waiting for their work to go on START are highly engaged and have already been requesting information. ○ Product owners and BT Managers are well known and respected in the segments they're representing. • There are high levels of trust in both BT's ability to deliver and our people's capability to learn and adapt. • We have access to a group of key users throughout IR. 	<ul style="list-style-type: none"> • Dropping the 'release' terminology may cause some initial confusion with our internal stakeholders, who are more familiar with releases rather than stages. • Effective engagement and communications with Child Support customers has a high dependency on the support and involvement of our Child Support team. The team's unique role, needs and values need to be well understood by the BT team when planning and delivering communications. • Anticipation for START v12 to drive innovation may mean that there is disappointment if there are limitations on improvements. • The update to START v12 brings change on change for teams who have been impacted at every release. Embedding will be difficult as people are still catching up.



Opportunities	Threats
<ul style="list-style-type: none"> • Getting the remaining tax products into START removes all remaining coexistence for our people and provides an opportunity for teams to look at ongoing service improvements. • V12 is the first upgrade experienced by IR and an opportunity to re-engage our people with START functionality, and how it assists them and our customers. • Stage 4 including Paid Parental Leave will help Families deliver on their Child Support strategy. • Prioritisation and delivery of optimisation initiatives will be delivered in partnership with the business and will provide the blueprint for delivering future change post BT. • The use of new technology throughout the COVID-19 levels has opened new communications channels and ways to engage with our people. • Stage 4 provides the opportunity to bring products currently stored on spreadsheets and databases into START, reducing risk and a significant amount of manual work maintaining them. • Currently only a very small portion of the unclaimed monies held by IR is published. 	<ul style="list-style-type: none"> • Updating START to v12, may prove hard, if not harder for our people than introducing a whole new system. • There is risk that messaging around changes delivered from the START delivery workstream may become confused if teams outside BT are also delivering change eg new legislation, optimisation. • The ongoing impacts of COVID-19 may add to our delivery scope and make engagement more difficult, and are not all known — but will include: <ul style="list-style-type: none"> ○ Changing priorities for our customers, affecting how we work. ○ Changes to our working environment – how and where they work. • High levels of change across IR in 2020/2021, including organisation design change, can mean change fatigue, and less focus on Stage 4. • Organisation design change could mean changes to teams and individuals BT depends on for stakeholder engagement, marketing and communications. • The initial publication of the updated Unclaimed Monies list is likely to generate an initial peak of work, greater than the current resourcing – delays in responding or high thresholds of proof may be seen negatively.



5.3 External environment

Strengths	Weaknesses
<ul style="list-style-type: none"> • IR's reputation to deliver change is strong. • External groups understand our go-live processes and trust that we'll prepare them well for change. • We have very strong external relationship teams (Community Compliance, BT Account Management, External Relationships, Significant Enterprises). • We've established good channels to communicate to key external stakeholder groups. • We are clear about who our customers are and what they need from us. • Existing relationships with key government agencies (MSD in particular) can be leveraged to support communications to key external groups. • We are the lead agency for Child Support – customers understand to come to us for information and questions. • The final products within Stage 4 have a relatively small customer base – with the possible exception of Unclaimed Monies where a lot of people could be interested to find out if they are owed anything. 	<ul style="list-style-type: none"> • We are not the lead agency for Paid Parental Leave which may make driving change more challenging. • Employers have played a key role in PPL application with the changes this will differ and IR will assist with income information. We need clear information to employers so they can provide correct information to their employees. • Although accountable for Child Support, IR may need to rely on MSD to communicate changes to their staff and customers. • IR may be reliant on other government agencies updating their systems before the benefits to customers from information sharing can be realised. • Testing solutions with customers may be challenging for customer groups such as Child Support. • Some customer groups, particularly those associated with Child Support, may be difficult to reach. • Dropping the 'release' terminology may cause some initial confusion with our established stakeholders and audiences, who have become familiar with the term.



Opportunities	Threats
<ul style="list-style-type: none"> • We've built up good relationships with external stakeholders and have good access to third party channels for our communications. We can also use third parties as our advocates. • The upgrade to version 12 presents an opportunity to re-engage customers with START functionality, focusing on their needs and benefits as opposed to product specifications. • Mobile optimisation for e-services with v12 provides opportunity to reach customers through their preferred channels. • Child Support customers rely on advocacy groups for information. There are further opportunities to work with these groups as we did in Release 3. 	<ul style="list-style-type: none"> • The impacts of COVID-19 may make engagement more difficult and are not as yet known — but may include threats to our ability to achieve cut through and communicate effectively, or changes needed to channels as work environments change. • The version 12 upgrade, while offering benefits, is another big change for some critical stakeholders. Some customer groups, having adapted to changes in myIR from previous releases, will again face extensive changes in the user interface. • There may be added complexity where there is a requirement to reach offshore customers. • There are high levels of reputational risk associated with products in START Delivery scope. • Multiple release dates during Stage 4 - (products/legislation/optimisation) may confuse and therefore impact customers awareness, understanding, and consequently what action they may need to take. • While the ability to put all the unclaimed money we hold with a name on the website is a huge opportunity to get money back to customers, there may be questions why IR hasn't kept the list up-to-date and made the information available sooner.



6 Communications and Engagement Strategy

Effective communication and engagement with a complex array of stakeholders is critical to the success of the transformation within IR, and a key construct of achieving the transformation goal of making it simpler, more open and certain for New Zealanders to pay their taxes and receive their entitlements.

Stage 4 is made up of five workstreams. Workstream 1, START Product Delivery, has a critical dependency on successfully engaging external stakeholders, both existing and new.

Some key considerations that shape our stakeholder engagement strategy for START Delivery are:

- **We know most of our stakeholders, and they know us.**
 - In Stage 4, for the most part, we will be engaging with well-informed stakeholders, both external and internal, who are familiar with IR's transformation objectives, the new START system and how we'll engage with them — however, we continue to identify new and effective ways to reach them.
- **START Delivery affects new stakeholders, or existing stakeholders in different ways than before.**
 - START Delivery will mean engagement with new stakeholder groups, as well as different types of engagement with current stakeholders. Effective engagement with these groups is critical.
 - More detail on these new stakeholders can be found in Section 7, New external stakeholders for START Delivery.
- **START v12 is an upgrade, not a product.**
 - We must take a different approach to communication and engagement of an upgrade over a product, with potential to 'relaunch' START to both our people and customers with a focus on benefits to teams and customer groups.
 - We will look to empower our people to help customers with a better understanding of the system.
- **We have effective, well established account and relationship management teams.**
 - Our BT Account Management team is well established and recognised at every external audit to be effective.
 - The BT Account Management team (comprised of Account Managers and External Relationship Managers) works collaboratively to manage engagement with external stakeholders, with a focus on groups such as professional bodies, software developers, banks and financial institutions, business organisations, Maori authorities, significant enterprises and customer advocacy groups, supporting grass roots engagement from within the organisation. More information on our account management function can be found in Section 8.



- BT has developed effective working relationships with customer facing teams including Community Compliance and Significant Enterprise by developing targeted webinars and supporting CCOM, their Tax Agent Network Group who manage initiatives for Tax Agents and Small Business, engaging with their Tax Agent Cohort as needed. SE Business Life Cycle managers will play an important role supporting their customer groups, specifically with the early release.
- **We acknowledge all the IR change our customers may be facing.**
 - Stakeholders are increasingly not seeing a difference between transformation and the rest of IR's activities, for example COVID-19 support, or transformation initiatives which have become business activities, for example Autocalc and Payday Filing.
 - Stakeholders are looking to IR to provide joined up information on what they need to know, across current and previous BT activities, and other IR activities.
 - Many external stakeholders have multiple, varied interactions and touchpoints with IR, and we have learned consistent information across these touchpoints is essential.
- **BT is an integral part of IR's Areas of Focus teams in areas of highest risk and change impact.**
 - We have seen great value in being part of the Areas of Focus teams which brings together IR expertise across broad areas of stakeholder engagement, for example tax agents and intermediaries, business and specific products such as Investment Income. This concept, introduced under Release 3, has continued through Release 4, led by CCS. It has proved successful to look at the bigger picture for stakeholders including, but not solely focused on, business transformation.
 - However, it has identified gaps in the current communication model, with BT providing proactive and reactive communications support to some external stakeholders beyond specific marketing campaigns.
- **We engage and collaborate with the business.**
 - Internally, BT has created an effective method of engagement with teams, moving away from change being driven (pushed) by BT, to BT supporting the business to drive and integrate change (pulled) — for example, the *Get Ready* campaign promoted significant re-engagement with R4 collateral pre go-live.
 - START Delivery Stage 4 will see us build further on existing collaborative partnerships and develop new ones where the release touches new areas and specialist teams administering products — for example, Child Support, Paid Parental Leave, Duties, NZ Foreign Trusts and Unclaimed Monies.
- **BT communications channels are well developed and fit for purpose.**
 - Over the years of transformation IR has moved to more digital and diverse channels in response to changing stakeholder expectations and needs.
 - This has meant the pace and currency of communications has improved. With the exception of the successful webinar platform, ON24, BT 'owns' few channels itself,



but focuses on supporting others (ELT, CCS-I and CCS-B, account managers, Marketing and Communications etc) to engage with our stakeholders.

- **We are agile and ready to respond to legislation changes and the impacts of COVID-19.**
 - COVID-19 affects all New Zealanders in varying ways. We do not know for certain the impacts that COVID-19 will have on our engagement strategy, but challenges could include a lower level of engagement due to changing priorities, and the need to change approach quickly if our existing engagement activities do not suit those in different working environments from before.

6.1 Communications Strategy

The above considerations identify some critical elements for success for START Delivery stakeholder engagement. Our strategy is to:

- **Use what we know works.** We will continue to develop our established engagement methodologies, relationships, processes and channels, particularly for the many stakeholder groups that are familiar with BT change.
- **Engage effectively with new stakeholders.** We will build our understanding and adapt our approach to meet the needs of our new stakeholder groups.
- **Help our people be ambassadors of change.** We will build a deeper understanding of the change with our people first and equip them to help our customers.
- **Taking a whole of IR view when engaging with stakeholders.** Acknowledging there are benefits and impacts which sit outside of BT change.
- **Be ready to understand, act and adapt.** Environmental impacts beyond our control may affect the effectiveness of our engagement. We will be prepared to recognise these impacts, understand them and act quickly in response.

6.2 Communications Objectives

Successful communications provides both a proactive strategy and reactive mitigations. At a broad level our communications objectives are:

- Decision makers and influencers support the transformation and have continued confidence in IR's ability to deliver.
- Everyone impacted by START Delivery change during Stage 4, both internally and externally, knows:
 - What will change?
 - What they will need to do differently and when?
 - Where to get help if they have problems?
- Key external and internal stakeholders feel they have been engaged and involved in transformation and understand and support the need for change.
- Communications risks are identified, managed and mitigated.

6.3 Communications Principles

Communications principles remain unchanged:



-
- Tell one IR story.
 - Be centred on our customers.
 - Be simple, open and certain.
 - Engage the right people with the right information at the right time.
 - Use plain English.
 - Tell our people first.



7 External Stakeholder Identification

7.1 External Stakeholder categorisation

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.

New stakeholder groups for Business Transformation are highlighted in red, with more information on new stakeholder groups following the table.

Detailed information for each stakeholder group, existing and new, is listed in Appendix 2 – Detailed External Stakeholder Analysis.

Note that more stakeholders will be added/identified once further analysis is done of the other components of Workstream 1.

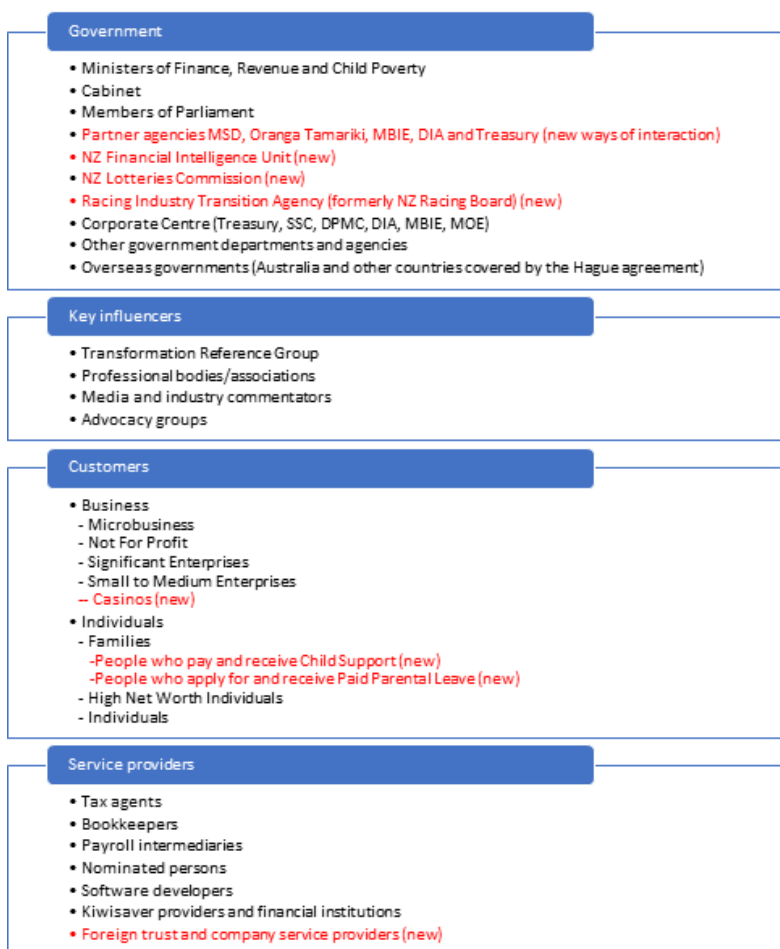


Figure 1: Stakeholders

7.2 New External Stakeholders for START Delivery

Included in the above categories are our new stakeholder groups for START Delivery. Earlier, we identified that focusing on understanding and meeting the needs of these groups is critical to our engagement strategy.

- MSD, MBIE, DIA and Treasury. They will become partners in the change, so we'll engage with them more closely and in different ways than we have done previously.
- Those paying or receiving Child Support and/or involved in the child support process. [Information redacted]
- Existing PPL applicants (those who have applied and/or are receiving payments), there will be changes to how they can manage their PPL. In addition, there will be general information for anyone looking to apply indicating changes will come in from Stage 4. For employers, they will no longer need to verify the customer income in the application, this will be done using the employment information they have provided through the employment information filed to IR. High value stakeholders involved with NZ Foreign Trusts. This small but influential stakeholder group includes DIA, the NZ Financial Intelligence Unit (part of the New Zealand Police) and foreign trust and company service providers. [Information redacted]
- New stakeholder groups affected by changes to Duties, including the New Zealand Lotteries Commission, the Racing Industry Transition Agency (formerly NZ Racing Board) and casinos. The main change for this audience is moving to more digitised processes.
- New stakeholder groups affected by changes to Unclaimed Monies. This group includes Treasury, Public Trust, government agencies and financial institutions. The main change for these stakeholders is the move to more digitised processes, and legislative change, including when money is considered unclaimed. There will also be changes for the wider public as Unclaimed Monies are made more discoverable and making the claiming process easier for people.

8 External Stakeholder Engagement

Inland Revenue interacts with external stakeholders on many levels through its day-to-day activities, as taxpayers, employers, partners, suppliers, as part of industry groups and as a result of the changes being delivered as part of the Business Transformation programme.

From the beginning of the Business Transformation programme, we have adopted an open and transparent approach to engaging and communicating with our stakeholders, including our customers. This principle will continue in Stage 4.

8.1 Stage 4 START Delivery Customer Impacts

The Change Impact Assessment for Stage 4 START Delivery suggests the following levels of impact for our customers. Areas of medium and high impact are highlighted in amber and red.

	Businesses				Individuals			Intermediaries				Business Partners						
	Micro Businesses	Not for Profits	Small Medium Enterprises	Significant Enterprises	Families	High Net Worth Individuals	Individuals	Bookkeepers	Nominated Persons	Payroll Intermediaries	Tax Agents	Tax Pooling Intermediaries	Legal (Trustee Organisations, Trusts, Estates, Family Court)	Advocacy Groups	Other Government Agencies	Overseas Agencies	Financial Institutions/Service Providers	Software Developers
Unclaimed Monies	Amber	Amber	Amber	Amber			Amber	Amber	Amber			Amber			Amber		Amber	
Paid Parental Leave	Amber	Amber	Amber	Amber	Amber				Amber	Amber	Amber			Amber	Amber			
Duties				Amber														
Foreign Trusts				Amber		Amber			Amber		Amber		Amber					
Child Support	Amber	Amber	Amber	Amber	Amber				Amber	Amber	Amber		Amber	Amber	Amber	Amber		
Version 12 Upgrade	Amber	Amber	Amber	Amber	Amber	Amber	Amber	Amber	Amber	Amber	Amber	Amber	Amber	Amber	Amber	Amber	Amber	Amber

Figure 2: Preliminary Customer Change Impact Assessment for Stage 4 START Delivery

8.2 BT Account Management

For Stage 4, BT Communications will continue to work with the BT Account Management team (which includes members of the External Relationships team), Product Owners, Community Compliance, with International Revenue Strategy and the Families Segment where appropriate to manage engagement with impacted external stakeholders.

The BT Account Management team is the primary conduit for managing external customer and stakeholder relationships and will continue to be accountable for external engagement across IR’s customer segments for Business Transformation’s Stage 4.

This is done by establishing and maintaining successful engagements with customers (and/or their advocacy groups) who are impacted by IR’s transformation and by providing a channel for their feedback directly to the programme.



The Account Management team aims to:

- Through a thorough understanding of the customers assist their understanding and engagement with IR's transformation objectives and explore how they will be impacted.
- Engage, advise and support customers when BT changes impact them.
- Ensure the customer voice is heard when design/solutions are being considered.
- Provide feedback within BT on customers' issues and concerns with change driven by BT.
- Work alongside our customers and the programme teams to stay on track to deliver the outcomes we have agreed.
- Work alongside teams within BT and across the business to support customers impacted by BT changes and to make sure the right transformation messages are shared across all customer segments.

BT Account Management are an integral part of Area of Focus teams and work closely with the business (Community Compliance Officers and Account Managers, Business Lifecycle Managers, the External Relationships unit and other business units within IR) and within the BT Programme, to make sure:

- Operational teams have the right transformation messages to share with customers.
- The business is supported.

8.3 Role of BT Communications

8.3.1 Informing Communications and Stakeholder Engagement activity

All BT Communications and Stakeholder engagement activities will take advice and input from the BT Policy team in terms of what can be said and when, along with Product Owners, to ensure messaging is accurate and appropriate to the audience. BT activities will supplement, but not replace, 'business as usual' activities. The monthly external stakeholder management meeting to monitor customer readiness, led by BT Account Management and attended by product owners, digital leads, Community Compliance, customer change, Marketing and BT communications will continue throughout Stage 4.

8.3.2 Working with IR Marketing and Communications

A Customer, Stakeholder and Marketing Plan for START Delivery Stage 4 will be developed in collaboration with the Marketing and Communications team. This will include an update to the stakeholder plan in line with the second, more detailed impact assessment. Messaging from this will be woven into the overall stakeholder and engagement communications activity and will inform the messaging for all customer groups.

In the meantime, the Marketing, BT Communications and Account Management teams will work closely to start building the Stage 4 narrative and agree a timeline of messages appropriate for each audience.

8.3.1 Supporting Account Management

The BT Communications and Engagement team will work closely with the BT Account Management team to maintain a schedule of planned engagement, develop core messages and information to provide a basis for Stage 4 communications, and presentation material to



support those engagements, and support them with their Stage 4 related communication needs.

The weekly communications meeting between BT Account Management, Communications and Marketing and the Change Team will continue through Stage 4.

8.3.2 Supporting other key Stakeholder Groups

The BT Communications team also has responsibility for supporting communications for other key stakeholder groups:

- **Ministerial and Government** (in conjunction with the BT Business Case team)

Supporting messaging to ensure Ministers have trust and confidence in IR's ability to deliver business transformation, are supportive of the programme approach and understand how it links to cross-government initiatives such as the Business Growth Agenda.

- **Other key partners and stakeholders**

Tax intermediaries, government agencies with whom we share information, banks and software developers will continue to be key groups for IR to engage with as we move into our final phase of transformation.



9 Internal Stakeholder categorisation

9.1 Internal Stakeholder categorisation

Internally, our stakeholders are categorised below. Detailed information can be found in Appendix 3 - Detailed Internal Stakeholder Analysis.

- Decision-makers: Executive Leadership Team, members of boards, governance and reference groups.
- Influencers: IR people (mainly leaders) whose opinion and positive perception of the programme will contribute to its success.
- Senior leaders (tiers 3 and 4): broken into those significantly impacted (CCS-I, CCS-B, and PF&F) and those not (other business groups).
- Team leaders and group leads: broken into those significantly impacted (CCS-I, CCS-B, and PF&F) and those not (other business groups).
- Our people: broken into those significantly impacted (CCS-I, CCS-B, and PF&F) and those not (other business groups). Of particular note are:
 - o The Families Segment (particularly Child Support teams which are located in ten regions, and the Families Segment Leadership Team) and the Paid Parental Leave team (currently in the Individuals Segment and moving into the Families segment mid 2020).
 - o People in the International Revenue Strategy team who manage NZ Foreign Trusts.
 - o Individuals Segment (particularly the Transactional teams in Upper Hutt who manage unclaimed monies and duties) and the Contact Centre.
 - o Community Compliance who manage front-of-house and account manage tax agents.

Note that the Child Support and Paid Parental Leave teams' unique role, needs and values need to be well understood by the BT team when planning and delivering communications.

- Key users.
- Unions.
- BT Team.



10 Internal Stakeholder Engagement

Inland Revenue is made up of approximately 5,500 people in 17 locations across New Zealand. A significant proportion are customer-facing teams including people who complete tax-technical, tax-policy and back office functions. Many of these people have been directly touched by the changes delivered through BT with all people at IR impacted in some way by IR's broader transformation goals.

Through previous releases, BT has created an effective method of engagement with teams, moving away from change being driven (pushed) by BT to BT supporting the business to drive and integrate change (pulled). Stage 4 will see us build on the existing collaborative partnerships we have with internal teams and will see us develop new partnerships with specialist teams administering products in Workstream 1A (Child Support, Paid Parental Leave, Duties, Foreign Trust and Unclaimed monies).

The proven success of internal communications tactics used in previous releases will be used again where appropriate, for example where the change is wide-ranging and touches multiple audiences across the business such as for the START v12 upgrade.

BT communications shares information with IR audiences through several channels it manages directly. In addition to providing content through existing channels, with the products impacting smaller, specialist teams, there is an opportunity to be more targeted in Stage 4 including utilising key users, specific group and team leaders, segment newsletters and TEAMS sites.

We will also seek to make the most of our new technology to engage people via digital channels to negate the need for large scale events and travel.

10.1 Stage 4 START Delivery Organisation Impacts

The Change Impact Assessment for Stage 4 START Delivery suggests the following levels of impact for our customers. Areas of medium and high impact are highlighted in amber and red.

	CCS-Individuals					CCS-Business					IIS	PFF	ITC	TCO	CI&A	P&C	PAS
	Individuals (incl Contact Centre)	Families	Micro Business	Community Compliance	Capability & Outcomes	SME	Significant Enterprises	Legal Services	Technical Specialist Network	International Revenue Strategy							
Unclaimed Monies	Red			Green	Green		Green				Orange			Green			Green
Paid Parental Leave	Green	Orange		Green	Green						Orange			Green			Green
Duties	Orange			Green	Green						Orange						
Foreign Trusts	Green			Green	Green		Green		Orange	Green			Orange				
Child Support	Orange	Red	Green	Orange	Green	Green	Green	Orange		Green			Orange	Green			Green
Version 12 Upgrade	Red	Orange	Orange	Red	Green	Orange	Red	Green	Green	Green	Red	Orange	Orange	Green	Green		Green

Figure 3: Preliminary Organisation Change Impact Assessment for Stage 4 START Delivery

10.2 Approach

In Stage 4, even more so than in previous stages and releases, though with some exceptions, we are dealing with well-informed internal stakeholders who understand the strategic priorities of transformation, and who have become accustomed to both the volume of change and the processes involved in changes that affect the ways they work. Key aspects of our communications are:

- Under the principle of right information to the right people at the right time, we will inform our people of the changes and what they mean to them, with particular focus on go-live readiness for directly impacted teams.
- We will continue to work to establish a pull model of change management, delivering change in partnership with the business (a co-change approach). We will work alongside customer facing teams and their leaders to engage them in what the changes will mean for them and their customers.
- We will provide support to the Product Owners, Channel Owners and Business Transformation Managers linked with our internal stakeholder groups and will actively identify and support advocates to help us tell our story internally.
- In collaboration with People and Culture, we will also continue to build and nurture a strong relationship with unions through established channels, reviewing these as necessary to ensure they continue to meet transformation and union objectives.



10.3 Relationship with Unions

The Transformation Programme continues to build and nurture a strong relationship with unions, in collaboration with People and Culture, who are responsible for IR's overall union relationship strategy.

Unions will be managed with the support of BT Communications. The BT relationship owner will be the Stage 4 START Delivery OCMT lead.

We will continue to build upon this relationship through established channels, reviewing these as necessary to ensure they continue to meet transformation and union objectives.

Engagement to date has included monthly teleconferences, hosting quarterly and six-monthly events, and our attendance at national union meetings, as well as specialised involvement such as weekly teleconferences with nominated members during Early Life Support.

Further details will be available in the planning documents for each workstream.



11 Measurement

It is essential that we measure what we do and set targets for the future, giving us the ability to actively adapt plans in response.

Our communications objectives, as set out in Section 6: Communications and Engagement Strategy, are listed below, with measurements associated with each:

Communications objective	Measurement
Decision makers and influencers understand the rationale for and support the transformation and have confidence in IR's ability to deliver.	<ul style="list-style-type: none"> • Feedback from governance groups and Ministers. • Media measures, including articles and opinion pieces from IR experts and identified business and media influencers and commentators. • Feedback from internal key influencers group.
Everyone impacted by Stage 4 changes, both internally and externally, knows: <ul style="list-style-type: none"> • What will change? • What they will need to do differently and when? • The benefits delivered in this phase of change • Where to get help if they have problems? 	<ul style="list-style-type: none"> • Customer readiness surveys. • Data and statistics on customers carrying out tasks they need to do before go-live, calls to contact centres, visits to customer-facing offices. • Questions asked and answered through webinars and other engagements. • Business and people readiness survey.
Stakeholder, customers and partners feel they have been engaged and involved in transformation and understand and support the need for change.	<ul style="list-style-type: none"> • Customer Insight and Evaluation (CI&E) Customer Readiness Surveys. • Feedback from key external groups. • BT generated coverage in industry media.
Communications risks are managed and mitigated.	<ul style="list-style-type: none"> • Measured as per BT Risk Register.



Appendix 1 – Stage 4 Scope

[IN CONFIDENCE]

Stage 4 – our final stage of business transformation

Workstream 1: START Product Delivery

Core Completion Delivery (Tax & Social Policy)

Digital Experience	Unclaimed Monies	Child Support
Developer Experience	Paid Parental Leave	v12 Upgrade
Interfaces	Duties	
myIR	Foreign Trusts	

New Legislation Delivery (Tax & Social Policy)

New Govt Initiatives	Annual Returns & Budget Changes
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Optimisation Delivery (Tax & Social Policy)

Digital Experience	Tax on Income Tax at Source	KiwiSaver
Developer Experience	Working for Families	Student Loans
Interfaces	PRODUCTION SUPPORT	
myIR		

Workstream 2: Technology Landscape Optimisation

TLO Technology Landscape Optimisation

TECHNOLOGY REFRESH	Enterprise Service Management & Monitoring (ESM&M)
SECURITY UPLIFT	DECOMMISSIONING
CONTACT CENTRE	NETWORK OPTIMISATION
WORKPLACE	

Workstream 3: Intel Led

Intelligence-Led

- Intelligent Information Project
 - Haukainga
 - Guided Help
- Data and Intelligence Platform

Workstream 4: ESS

ATEA ESS – Enterprise Support Services

Release 3.2 (2 June'20)	Release 3.3 (4 July'20)	Release 4.1
Human Capital Management & Enterprise Performance Management	Payroll and Other (b/c)	

Workstream 5: Transition and Business Integration
Transition of our knowledge, practices, and processes to the business as usual and closing out the BT programme. This stream will work closely with business units and He Kotuitui to ensure a smooth transition.



Appendix 2 – Detailed External Stakeholder Analysis

External stakeholder group	Audience	Communication requirements and objectives	Key channels
Government	Ministers of Finance, Revenue and Child Poverty, Social Development and Internal Affairs	<ul style="list-style-type: none"> • That Ministers guide the overall direction of IR's transformation. • That Ministers are confident about IR's ability to deliver Business Transformation and are supportive of the programme approach. • Ministers are clear about transformation goals and help manage programme scope expectations. • Ministers are committed to introducing legislation that underpins BT, changes to Income Tax and the Tax Administration Act. 	<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.
	Cabinet	<ul style="list-style-type: none"> • Ministers understand that the programme is about making tax simpler for New Zealanders. • Ministers are confident in IRs ability to deliver the programme. • Ministers understand the impacts on their constituents or portfolios and how IR is working across government. 	<ul style="list-style-type: none"> • Cabinet Papers. • Six-monthly Transformation updates. • Input into FEC process. • Reports from other Government agencies. • Formal and informal contact with key stakeholder groups. • External newsletters. • Publication of key Programme documentation.



External stakeholder group	Audience	Communication requirements and objectives	Key channels
	Members of Parliament	<ul style="list-style-type: none"> Understand IR's broad strategy, objectives and timeframes, that transformation is more than an 'IT project' and that it is being well managed. MPs understand the impacts on their constituents. 	<ul style="list-style-type: none"> FEC briefings. Programme 'product' fact sheets and updates eg cutover dates.
	Partner agencies: MSD, Oranga Tamariki, MBIE, DIA and Treasury	<ul style="list-style-type: none"> Understand changes for their processes. Share key messages and communications approaches – act as advocates of key changes. Support communications to 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 Account Manager and product owner).
	NZ Financial Intelligence Unit	<ul style="list-style-type: none"> Understand changes for their processes and policy as part of changes to Foreign Trusts. 	<ul style="list-style-type: none"> Email and phone correspondence with International Revenue Strategy Team. Other TBD.
	NZ Lotteries Commission	<ul style="list-style-type: none"> Understand changes for their processes (Duties). 	<ul style="list-style-type: none"> Email correspondence with Duties Team. Other TBD.
	Racing Industry Transition Agency (formerly NZ Racing Board)	<ul style="list-style-type: none"> Understand changes for their processes (Duties). 	<ul style="list-style-type: none"> Email correspondence with Duties Team. Other TBD.



External stakeholder group	Audience	Communication requirements and objectives	Key channels
	Other government departments and agencies www.business.govt.nz	<ul style="list-style-type: none"> Understand the overall and specific changes for business customers and their role in communicating these. Understand what content they will be required to change. Provide updates around processes, specifically PPL, NZ Foreign Trusts and Unclaimed Monies 	<ul style="list-style-type: none"> Regular meetings with business.govt.nz team. Agreed common work programme. Newsletter content. Investigate potential involvement in annual roadshow. BT Account Management team.
	Overseas governments covered by the Hague Agreement (Australia and others)	<ul style="list-style-type: none"> Understand changes for their processes. Share key messages and communications approaches. Support communications to their customers as part of policy change where applicable. 	<ul style="list-style-type: none"> Existing Relationship Managers.
Key influencers	Transformation Reference Group	<ul style="list-style-type: none"> Seek input and advice. Share progress updates and plans. 	<ul style="list-style-type: none"> Meetings. Presentations.
	Professional bodies/associations	<ul style="list-style-type: none"> Seek input and advice. Share progress updates and plans. 	<ul style="list-style-type: none"> Existing Relationship Managers. Meetings. Presentations.
	National media and main city-based publications	<ul style="list-style-type: none"> Understand transformation and why it is necessary. Key messages around START Stage 4 changes. 	<ul style="list-style-type: none"> Publication of key programme documentation. Back pocket notes for CIR and DCs. FAQs and reactive statements. Website.



External stakeholder group	Audience	Communication requirements and objectives	Key channels
	Regional press, trade and business publications	<ul style="list-style-type: none"> Understand transformation and why it is necessary. Key messages around START Release changes specific to interest groups. 	<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.
	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. 	<ul style="list-style-type: none"> Publication of key programme documentation. Media portal. Website. FAQs and reactive statements.
	Advocacy groups Community advocacy groups/beneficiary advocacy groups/budgeting services Parenting specific groups	<ul style="list-style-type: none"> Understand the changes proposed to Child Support. Know what information to give members. Know where to point people to for more information. 	<ul style="list-style-type: none"> Account Managers. Community Compliance. Factsheets and other collateral for sharing. Social media. FAQs.

<p>Customers</p>	<p>Individuals:</p> <ul style="list-style-type: none"> ○ Families ○ High Net Worth Individuals ○ Individuals 	<p><i>Version 12 customers</i></p> <ul style="list-style-type: none"> • Understand improvements to e-services that change their interactions with IR. • Understand how to interact with IR through digital channels. • Know how to complete tasks in the new interface. • Increase their understanding of how the system helps them <p><i>Child Support customers</i></p> <ul style="list-style-type: none"> • Understand any changes to Child Support – particularly changes that affect payment timing. • New customers understand how to apply for Child Support online. <p><i>Child Support customers receiving a benefit</i></p> <ul style="list-style-type: none"> • Understand changes and effects. • Know what to expect for their Child Support payments. • Know where to go for more information. <p><i>Paid Parental Leave customers</i></p> <ul style="list-style-type: none"> • Existing customer - Know what the changes will be and know how to find information and manage their PPL. • New Customers understand how to apply for PPL online • All customers know what the changes are and where to go for more information. 	<p><i>Version 12 and Child Support customers</i></p> <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. • Account Managers (where applicable). • Community Compliance. • BT Account Management team. <p><i>Child Support customers receiving a benefit</i></p> <ul style="list-style-type: none"> • Jointly with MSD. <p><i>Paid Parental Leave customers</i></p> <ul style="list-style-type: none"> • MBIE likely to take lead. <p><i>Foreign Trusts customers</i></p> <ul style="list-style-type: none"> • Tax Agents. • Marketing and communications channels. • Account Managers (for High Net Worth Individuals).
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External stakeholder group	Audience	Communication requirements and objectives	Key channels
		<p><i>Foreign Trusts customers</i></p> <ul style="list-style-type: none"> Understand changes, including changes to e-services to allow them to file returns and access information digitally (and what this means for their tax agents). <p><i>Unclaimed Monies</i></p> <ul style="list-style-type: none"> Understand changes and where to go for further information. 	

	<p>Business:</p> <ul style="list-style-type: none"> • Microbusiness • Not for Profit • Significant Enterprises • Small to Medium Enterprises • Casinos • Holders of Unclaimed Monies 	<p><i>All</i></p> <ul style="list-style-type: none"> • Understand how the changes impact them and what they need to do. <p><i>Significant Enterprises (for NZ Foreign Trusts)</i></p> <ul style="list-style-type: none"> • Understand changes, including changes to e-services to allow trustees to file returns and access information digitally. • Know what this means for their tax management. <p><i>Casinos (for Duties)</i></p> <ul style="list-style-type: none"> • Understand changes for their processes. <p><i>Unclaimed monies</i></p> <ul style="list-style-type: none"> • For trusts, charities and businesses, understand changes and where to go for further information. <p><i>Holders of Unclaimed Monies</i></p> <ul style="list-style-type: none"> • Understand changes to legislation and how this will impact on their processes. <p><i>Version 12 customers</i></p> <ul style="list-style-type: none"> • Understand improvements to e-services that change their interactions with IR. • Understand how to interact with IR through digital channels. • Know how to complete tasks in the new interface. • Increase their understanding of how the system 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.
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External stakeholder group	Audience	Communication requirements and objectives	Key channels
Service providers and partners	Intermediaries, Tax Agents, Financial advice/support groups, Bookkeepers and Payroll Bureaux, Professional Bodies, Representatives, Nominated Persons	<p><i>Overall</i></p> <ul style="list-style-type: none"> Understand the changes, how they impact them and what they need to support their clients. <p><i>Version 12</i></p> <ul style="list-style-type: none"> Know how to complete tasks in the new interface. Feel that the interface is intuitive and easy to navigate. Understand what they see vs what the customer sees (if different). <p><i>NZ Foreign Trusts</i></p> <ul style="list-style-type: none"> Understand the changes and what this means for them and their clients. Know how to file returns for trusts online. 	<ul style="list-style-type: none"> Engagement with tax agent groups – conference roadshows etc. Existing marketing and communications channels for these groups. Communication from industry groups. BT Account Management team. Tax Agent Cohort. Community Compliance. Webinars and seminars.
	Software developers and Payroll Developers	<ul style="list-style-type: none"> See themselves as part of the wider tax ecosystem. 	<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. Community Compliance. Existing Marketing channels.



External stakeholder group	Audience	Communication requirements and objectives	Key channels
	Financial Institutions and KiwiSaver Providers	<ul style="list-style-type: none"> • Understand that transformation will reduce compliance costs long term. • Understand their role and how it will change. • Are aware of their responsibilities. • Understand changes to legislation for Unclaimed monies and how this will impact on their processes. 	<ul style="list-style-type: none"> • Account Managers SE. • Marketing and communications channels. • Newsletters. • Industry groups. • Banking institutes. • + BT Account Management team.
	Foreign trust and company service providers	<p>Major stakeholders include: [Information redacted]:</p> <ul style="list-style-type: none"> • Understand changes, including changes to e-services to allow trustees to file returns and access information digitally. • Know what this means for their tax management. 	<ul style="list-style-type: none"> • International Revenue Strategy (IRS). • BT Account Management team. • Account managers.



Appendix 3 – Detailed Internal Stakeholder Analysis

Group	Audience Group	Communication requirements and objectives	Key Channels
Decision-makers	Executive Leadership Team, members of boards, governance and reference groups	<ul style="list-style-type: none"> • Are advocates of Transformation with their groups, and internal and external stakeholders. • Direct the Business Transformation strategy and approach – ensuring BT is business led. • Are confident that the programme is delivering. • Understand and support the scope and delivery plans. 	<ul style="list-style-type: none"> • Weekly ELT meetings. • Governance and reference group meetings including SGB and PGC. • Briefings from Programme Director, Product Owners and Stream Leads. • SRO meetings. • Monthly BT status updates. • Participation in TEWC and Design Authority meetings. • IR internal and external communications.
Influencers	IR people – mainly leaders – whose perceptions and opinions will contribute to the programme's success	<ul style="list-style-type: none"> • Are advocates of Transformation. • Understand how the programme works and how to direct people to more information. • Are confident that the programme is delivering. 	<ul style="list-style-type: none"> • Special series of meetings run by BT Programme leadership to talk about the specific changes applicable to their groups. • Area of Focus Groups. • Business Group Leadership Team meetings. • Monthly BT Leaders Update. • BT Intranet pages. • People Leaders intranet site.
Senior leaders	Tier 3 and 4 leaders significantly impacted (CCS-I, CCS-B, PF&F)	<ul style="list-style-type: none"> • Understand and support the scope and strategy of Business Transformation. • Are advocates of Transformation with their groups - communicate clearly and consistently about transformation. 	<ul style="list-style-type: none"> • Participation in and Design Authority meetings. • Briefings from Programme Director, Product Owners and Stream Leads. • Monthly BT status updates. • IR internal and external communications. • Regular meetings including meeting papers.



Group	Audience Group	Communication requirements and objectives	Key Channels
		<ul style="list-style-type: none"> • Are actively involved in the programme providing direction and ensuring BT is business led. • Have the information they need to make decisions about the programme and related work across IR. • Understand and support the scope and strategy of Business Transformation. • Have the information they need to make decisions about the programme and related work across IR. • Communicate clearly and consistently about transformation. 	<ul style="list-style-type: none"> • Participation in virtual workshops. • Informal and formal meetings and briefings as required. • Key IR and BT external communication channels including website, media releases, newsletters. • Regular programme engagement. • Involvement in BT workstreams. • Participation in Business unit meetings and Design Authority. • Events including Regional People Leaders' Forums – (or the new equivalent) and Stage 4 substitute for Design Review Workshops. • Key IR and BT external communication channels including website, media releases, newsletters.
	Tier 3 and 4 leaders not significantly impacted (IT&C, CI&A, P&C, IIS, PAS, TCO (formerly OCTC))	<ul style="list-style-type: none"> • Understand and support the strategy, objectives and approach. • Recognise the contribution their group makes to the successful delivery of transformation. • Know what to communicate, when and how. • Build the confidence of their team leaders and business group staff. • Recognise that transformation is about all of IR. • Ability to step up to show leadership on behalf of ELT. 	<ul style="list-style-type: none"> • Business Group Leadership Team meetings. • Regional People Leaders' Forums (or the new equivalent). • Monthly BT Leaders Update. • BT Intranet pages. • People Leaders intranet site.



Group	Audience Group	Communication requirements and objectives	Key Channels
Team Leaders	Directly impacted by significant change (CCS-I, CCS-B, PF&F)	<ul style="list-style-type: none"> • Know what is happening, and what the implications are for their business group, feel involved discussions about the changes. • Kept informed so they are able to lead their people. • Lead the changes. • Support the Key Users in their teams. • Know what to do and what to share and communicate with their team. • Are confident with the change and able to encourage their team. • Know how to provide feedback. 	<ul style="list-style-type: none"> • Monthly BT Leaders Update. • Regional People Leaders' Forums (or the new equivalent). • People Leader Brief. • People Leaders intranet. • BT Intranet pages. • Monthly BT update presentation. • Product Owner / BTM conversations.
	Team leaders NOT directly impacted by significant change (IT&C, CI&A, P&C, IIS, PAS, TCO (formerly OCTC))	<ul style="list-style-type: none"> • Kept informed so they are able to lead their people. • Know what to do and what to share and communicate with their team. • Support the Key Users in their teams. • Are confident with the change and able to encourage their team. • Know how to provide feedback. 	<ul style="list-style-type: none"> • Monthly BT Leaders Update. • Regional Leadership Forums. • BT Intranet pages. • People Leaders intranet. • People Leader Brief.
Our People	Staff directly impacted by significant change (CCS-I, CCS-B, PF&F)	<ul style="list-style-type: none"> • Are well informed about direct impacts on them. • Know what they have to do, when and how. • Are aware of impacts on others. • Understand and support the changes IR is making to how we work. 	<ul style="list-style-type: none"> • Meetings in a Box and other meetings from their leader. • Product-focused deep dives. • Specific group newsletters (for example, Happy Friday, the Families Segment newsletter). • Yammer campaigns.



Group	Audience Group	Communication requirements and objectives	Key Channels
		<ul style="list-style-type: none"> • Understand how and when to be involved in transformation. • Understand how to support customers as a result of the changes. • Any disruption to their work is minimised. • Feel they are being supported through the changes. 	<ul style="list-style-type: none"> • BT Intranet pages. • Monthly BT update presentation. • Transformation News. • Chat with Greg sessions. • Design Review Workshop replacement activity. • IR Intranet. • BT Communications email. • Information from Unions (for members).
	Child Support and Paid Parental Leave teams	<ul style="list-style-type: none"> • A deeper understanding of the changes. • Understand how Stage 4 impacts the achievement of the Families Strategy. 	<ul style="list-style-type: none"> • Continued relationship with Product Owners. • Specific engagement where appropriate. • Group/Segment newsletters. • Deep dives.
	International Revenue Support team	<ul style="list-style-type: none"> • A deeper understanding of the changes. 	<ul style="list-style-type: none"> • Continued relationship with Product Owners. • Specific engagement where appropriate. • Group/segment newsletters. • Deep dives.
	Duties and Unclaimed monies teams	<ul style="list-style-type: none"> • A deeper understanding of the changes. 	
	Staff NOT directly impacted by significant change (IT&C, CI&A, P&C,	<ul style="list-style-type: none"> • Are aware of impacts on others. • Understand and support the changes IR is making to how we work. • Understand how and when to be involved in transformation. 	<ul style="list-style-type: none"> • Meetings in a Box and other meetings from their leader. • BT Intranet pages. • Yammer campaigns. • Transformation News.



Group	Audience Group	Communication requirements and objectives	Key Channels
	PAS, IIS, TCO [formerly OCTC]	<ul style="list-style-type: none"> Any disruption to their work is minimised. Feel they are being supported through the changes. 	<ul style="list-style-type: none"> Monthly BT update presentation. IR Intranet. BT Communications email box. Information from Unions (for members).
Key Users	Champions of Change – using their ability to bring others in their team along the journey of positive change and learning	<ul style="list-style-type: none"> Support and communicate transformation objectives, outcomes and timetable. Are actively involved in the programme. Understand that transformation is making tax simpler for New Zealanders. Understand the specific changes for teams within their groups. 	<ul style="list-style-type: none"> Key user phone call. Key user intranet page. Monthly BTM update pack. Virtual Chat with Greg sessions.
Unions	Unions:	<ul style="list-style-type: none"> Are engaged in the programme, with a particular but not exclusive focus on the 'people' aspects. Provide input into and support the processes BT is using to manage the people aspects of Stage 4 implementation. Understand the decisions IR makes with regard to changes for staff. Have the information they require to be able to communicate clearly and accurately with their members. Understand the timeframes, process and approach for transformation. 	<ul style="list-style-type: none"> BT Implementation Workshops twice each year, where they have the opportunity to feedback on key aspects of BT Stage 4. Monthly BT TEAMS event. Sending representatives to make presentations at national union meetings. Specialised involvement in activities such as weekly calls with nominated members about ELS. On-going informal contacts. [Information redacted] BT Newsletter. IR internal and external communications – eg intranet, media coverage.
BT Team	Programme Leadership Team,	<ul style="list-style-type: none"> Programme members are well informed, understand how their work contributes and 	<ul style="list-style-type: none"> BT Meeting in a Box to support workstream leads communicate milestones and complex decisions.



Group	Audience Group	Communication requirements and objectives	Key Channels
	workstreams, all programme	<p>connects to the rest of IR and within the programme, and are proud of where they work.</p> <ul style="list-style-type: none"> • A positive team climate is maintained. • Help retain the right people. • Programme team members understand how we are communicating and engaging with internal and external stakeholders. • Team members understand our key messages and confidently and consistently communicate these. 	<ul style="list-style-type: none"> • Huddles. • Greg's Update - Weekly DC Transformation emails. • BT Intranet – Ongoing. • BT SharePoint. • End of Programme event (TBA).