

# Stage 4 START Delivery Release 2 – Cutover and Outage

## **Communications Strategy**

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## **PREPARED FOR:**

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## About this document

This document outlines the communications strategy for the outage period for Stage 4 START Delivery Release 2 in October 2021. A separate Tactical Communications Plan is being developed that details the tactics we will deploy to enact this strategy.

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# **Communications Strategy**

#### Purpose

To articulate the strategy to communicate to our customers, stakeholders and people regarding system availability and business shut down dates and times in the lead up to the implementation of Stage 4 START Delivery Release 2.

This strategy may be updated as new impacts are discovered. The Programme is striving towards an October go-live as planned, but are closely monitoring the impact of external events which may affect this timing, such as COVID lockdowns and the recent closure of our Wellington office.

Any dates in this strategy may change as timing is confirmed after mock go-live 3 in September.

#### Background

To enable Stage 4 START Delivery Release 2 many of our systems need to shut down so the necessary data migration, testing and preparatory work can happen. This process – known as 'Cutover' – is currently expected to take place between 4pm on Thursday 21 October and 8am Thursday 28 October 2021.

Please note, it will be a business decision as to the timing of the opening of the contact centres and front of house when system availability resumes.

#### **During cutover**

During cutover, myIR, our contact centres and customer facing offices will be closed. Customers won't be able to access their information or perform tasks such as GST and other filing (other than making payments through their bank).

#### What channels and services will be available?

There will be no interruption to customers' ability to pay IR via internet banking, and social media channels will be available during business hours only. Social channels will be monitored over the shutdown to identify urgent emerging issues only. Internally Haukāinga, Ātea Learning, email system, Teams, START training environment and Ātea will be available.

#### Impacts

There are a number of payments that will be made earlier as a result of the cutover. Also, prior to shutdown will be the last time most people will have access to FIRST.

#### **Payments**

Payments for Working for Families Tax Credits (WfFTC) and Paid Parental Leave due to be made during the cutover will be made earlier in some cases:

WfF payments (Weekly/Fortnightly): If customers normally receive weekly/fortnightly payments on Tues 19 Oct (or Wed 20 Oct) this will not change.

WfF (weekly) However weekly customers will receive their next payment in that same week, on Thursday 21 October (or Friday 22 Oct). This is the payment they would normally receive Tuesday 26 Oct (or Wed 27 Oct). This customer group will get paid twice in one week and not get paid the week we're slated to closedown.

PPL: If customers normally receive their fortnightly payment on Tuesday 26<sup>th</sup> Oct (or Wednesday 27<sup>th</sup>), we will bring the payment run forward and they will receive their money on Thursday 21<sup>st</sup> Oct (or Friday 22<sup>nd</sup> October).

The next fortnightly PPL payment would be as per the BAU schedule and would be disbursed to customers on Tuesday 9<sup>th</sup> November (or Wednesday 10<sup>th</sup> November). This puts a three -week gap between payments. Additional comms to this group are planned for clarity.

Child support receiving carers who are flagged as "early payers" in FIRST will receive their money early, as well as any arrears. A child support payment run will occur on both Wednesday 20 and Thursday 21 October. Most people will be paid overnight on Wednesday, so we will still have all our channels open on Thursday if we need to process urgent refunds, or if customers want to contact us or check their myIR account for payment details. The Thursday payment run will pick up anyone missed in the Wednesday run.

Communications will be prepared to inform customers about the early payment event and making sure they're aware of our closure immediately following their payment. Reactive communications will be prepared to support customers and reduce contacts in the event that they have queries about their payment (or there are payment errors).

#### GST filers – 28 Oct filing and payment date

Monthly and bi-monthly GST payments, returns and provisional tax instalments are due by 28 October. This coincides with the current planned dates for the cutover outage period of 21 October to opening back up on the morning of the 28 October (TBC).

This impacts approximately 500,000 GST filers who are set to file and pay GST on or just before Thursday 28 October 2021. To mitigate the impact, we will be communicating to this audience from the 1 October encouraging them to file early and alerting them to the shut-down period. As well, we're preparing contingency plans (TBC) similar to previous cutovers including the option to communicate a grace period for filing and paying GST in the event that our systems are not back up and running before 28 October. This would require Commissioner approval but will be drafted as an option in the contingency plans.

#### **Employers**

Employers need to complete payday filing two days after paying their staff. We have plans in place for those impacted by these closure dates. We will encourage early filing and clarify that closure dates do not count as working days for filing purposes. We are confirming final details of messaging including making sure customers will not be disadvantaged by closure dates or changes to filing. These details will be included in our tactical and contingency plans.

#### FIRST access

As this is the final START release and all tax and social policy products will be in START, most people who have access to FIRST will lose it at the end of October 2021. FIRST will be in a read only state until the end of November at which point it will be shut down and handed over to the decommissioning team. A separate communications strategy is being delivered to our people about the decommissioning of FIRST.

#### Timing

Currently, Cutover is expected to take place between 4pm Thursday 21 October and 8am Thursday 28 October 2021. This timing will be communicated following the completion of mock go-live 3.

## Key dates

Date	Event
5 – 16 July	Mock Go Live 1
16 - 27 August	Mock Go Live 2
13 - 24 September	Mock Go Live 3
1 month before close down (24 September 2021)	Service Update page is live Cutover messages go out via all channels to customers and stakeholders (details in tactical communications plan)
From 4pm Thursday 21 October	Cutover close down
From 8am Thursday 28 October	Go-live

## Timing of communications by audience group and channel\*

We will start informing our audience groups of the service availability during the close down period as soon as the third mock go-live is complete.

Audience	August	September	October
IR Staff	BT Leaders Update; Monthly Info Pack;	BT Leaders Update; Transformation News; Key users briefing; Featured News; People Leader Messages	BT Leaders Update; Snapshot; Featured News; Email; People Leader Messages; key user briefing
Tax Professionals (including professional associations)	Relationship/ BT Account Managers, Community Compliance	Agents Answers; Tax agent email ; Service update page; myIR notification; Relationship/ BT Account Managers Webinars, direct email as applicable (in planned marketing)	BT Account Managers, Media Release; Service Update Page; myIR notification; Social media; Contact centre IVR; Front Office Screens; IRD homepage banner;
Small and Medium Sized Businesses (incl professional bodies, industry associations etc.)	BT Account Managers, Community Compliance	Webinars; Email; Service Update Page; myIR notification; Social media; IVR message; Front Office Screens;, Community Compliance, BT Account Managers, emails	Webinars; Email; Service update Page; myIR notification; Social media; IVR message; Front Office Screens; IRD homepage banner, Community Compliance, BT Account Managers, emails
External stakeholders (Large Enterprises / Gov Depts / Banks etc)	BT Account Managers,	Webinars; Email; Large Enterprise Update; Phone message; Service update page BT Account Managers Briefing pack for MPs	BT Account Manager briefing Emails

Audience	August	September	October
Third parties and partners (software providers etc)	Relationship/ BT Account Managers	Relationship/ BT Account Managers	Relationship/ BT Account Managers
All IR Customers (General Public)		Service update Page;	Service update Page; myIR notification; Social media; IVR message; Front Office Screens; IRD homepage banner.

\*Exact timings are subject to change and will be updated in the tactical plan.

## Target audiences

The target audience for this strategy is all customers and stakeholders who may try and use IR services during the cutover period, as well as our staff.

#### **Customer audience groups**

Customer groups who are more likely to contact us, or want to perform an action during the cutover period are detailed below:

Audience group	Why they might want to contact us	Services unavailable during closedown period	Services available during closedown period
Tax professionals	<ul> <li>Undergoing their daily work on behalf of clients</li> <li>Urgent changes need to be made to client's tax affairs</li> <li>Their own tax affairs</li> <li>COVID support/advice for clients (if applicable)</li> </ul>	<ul> <li>Specialist advice and help from contact centre</li> <li>myIR</li> <li>START Gateway Services (Income and Return Service APIs)</li> </ul>	<ul> <li>www.ird.govt.nz intermediaries and other section of website</li> <li>IR social media channels*</li> <li>Bank payments</li> </ul>
Businesses	<ul> <li>GST returns and payments</li> <li>Employment Information returns and payments managing their tax</li> <li>COVID support/advice (if applicable)</li> </ul>	<ul> <li>EI or GST returns through myIR</li> <li>Gateway Services (employers who use integrated software)</li> <li>Specialist advice and help from contact centre</li> <li>Front of house</li> </ul>	<ul> <li>Payments will be able to be made to IR via internet banking</li> <li>www.ird.govt.nz</li> <li>IR social media channels*</li> </ul>
Employers	<ul> <li>Employment information returns and payments</li> <li>COVID support/advice (if applicable)</li> </ul>	<ul> <li>myIR</li> <li>Gateway Services (employers who use integrated software)</li> </ul>	<ul> <li>www.ird.govt.nz</li> <li>Payments will be able to be made to IR via internet banking</li> <li>IR social media channels*</li> </ul>
Social Policy customers – WfF & PPL	<ul> <li>Urgent payment required</li> <li>Need to update their details</li> <li>Receive their payment details</li> <li>General questions about their entitlements</li> <li>Change in circumstances</li> </ul>	<ul> <li>Advice from contact centre</li> <li>Checking their details and entitlements on myIR</li> <li>Front of house</li> <li>Urgent payment/chasing up incorrect or non- payment</li> </ul>	<ul> <li>Social media channels*</li> <li>www.ird.govt.nz</li> </ul>

Audience group	Why they might want to contact us	Services unavailable during closedown period	Services available during closedown period
Social Policy customers – Child support	<ul> <li>Need to update their details</li> <li>Receive their payment details</li> <li>General questions about their entitlements</li> <li>Change in circumstances</li> </ul>	<ul> <li>Advice from contact centre</li> <li>Checking their details and entitlements on myIR</li> <li>Front of house</li> </ul>	<ul> <li>Social media channels*</li> <li>www.ird.govt.nz</li> </ul>
New businesses	<ul> <li>Incorporating through the Companies Office</li> <li>Registering for IRD number</li> </ul>	<ul> <li>They may receive IRD registration details late (normally automated within 48 hours).</li> <li>Front of house</li> </ul>	<ul> <li>Companies Office</li> <li>www.ird.govt.nz</li> </ul>
General customers	<ul> <li>Access myIR</li> <li>Register for IRD number</li> <li>For answers to general questions we get asked regularly.</li> </ul>	<ul> <li>Advice from contact centre</li> <li>Checking their details and entitlements in myIR</li> <li>FOH closed to customers - no appointments taken during the outage</li> </ul>	<ul> <li>IR social media channels</li> <li>www.ird.govt.nz</li> </ul>

\*Note: On IR social media channels we provide information and answer general questions about tax and entitlements. We can't answer questions specific to a customer's situation because we can't validate customers on social. We do not accept direct messages via social media channels. Social channels will be available over cutover for customers for reference only. These will not be updated during the cutover. However, they will be monitored to identify and respond to potential urgent issues if they arise.

#### Internal audience groups

Audience Group	Interest	Services unavailable during closedown period	Services available during closedown period
All Staff Staff that use one of the impacted systems All Leaders Leaders of teams that use the impacted systems Facilities Management	Staff will need to know so they can answer customer questions and plan their work Leaders will need to be kept informed to ensure they are managing the workflow for their staff correctly Will be kept informed as	Information redacted	<ul> <li>Ātea Learning</li> <li>Ātea</li> <li>EDW and DIP</li> <li>Office365 suite will be available         <ul> <li>e.g. Outlook, Teams, Work, PowerPoint, Excel etc.</li> </ul> </li> <li>Training</li> </ul>
	they look after front of house and office security		<ul> <li>environment</li> <li>Intranet</li> <li>STAX</li> <li>IRD website</li> </ul>

#### Risks / mitigation

Risk	Mitigation
Customers are unaware they are	Use all relevant external communication
unable to get in touch during the close	channels at our disposal to ensure we have

down period via phone, myIR or our customer facing offices.	given customers as much notice as possible of the outage due to the system upgrade and what will not be available during this period. During the close down, direct our customers to information or services that are available.
Customers inundate our social media channels with requests and questions.	Ensure out-of-hours social media monitoring for urgent issues is maintained and respond to any urgent queries that come through. Otherwise, pinned outage post will sit at top of social pages directing customers to our website for more information.
	Prepare standard responses and ensure we constantly update followers on what is available and also what we are able to answer via these channels. Keep media team updated on any potential or real issues as per normal process.
Go live is only partially successful and system remains unavailable after the close down period.	Mitigation to be managed by BT deployment team with communications support from Marketing & Communications.
	Update closedown landing page (ird.govt.nz/service-update. If cutover takes more time than expected, we can update this page and all of our channels to direct people here via the shortlink. This includes myIR outage page, webpage banner, social media channels and contact centre VRC.
	Use BT Account Management to get messages out to key stakeholders.
Customers incur penalties due to late filing and they blame this on the cutover and not being informed.	Impacted customers will also be reminded of due dates in advance.
cutover and not being informed.	We will prepare a standard response to these customers and ensure our customer facing teams understand any mitigation measures implemented due to the cutover.
Negative media coverage about close down.	Contingency plans prepared. We will work with the media team to develop a robust set of Q&As and we will send out a proactive press release front footing the changes.
Timeframes for the cutover period move	Keep staff, customers and external stakeholders up-to-date with progress and expected timeframes.
	Prepare communications contingency plan to cover this eventuality – including full roll back.
Child support, Working for Families and Paid Parental Leave payment	Communications will be sent to this group in advance informing them of the change to

impacted by shutdown. Customers will receive their payment early but will then be unable to contact us or check anything in myIR for a week.	their payment day. Messaging will be required over shutdown to reduce contact by customers wishing to query their payment during this period. This will be included in our tactical plan. The payments will be made in advance of cutover, allowing customers the time to log into myIR or get in touch with us if they believe something is not right.
Monthly and bimonthly GST filers will be due on 28 Oct. This is roughly 500,000 customers. They won't be able to use myIR during the outage period to file	Communicate with these customers in advance, encouraging them to complete their returns prior to the shutdown. This is in line with BAU payment reminders currently employed via social and will be expanded to other channels TBC. We will cancel the reminder notification (web message and SMS) that goes out the day before the due date as that falls during the cutover period.
Employers cannot complete payday filing during outage period	Communicate with these customers in advance, encouraging early filing, if possible. Clarifying that closure dates do not count as working days for filing purposes. Confirming messaging about customers not being disadvantaged (this may fall under COVID response messaging) for tactical and contingency plans.

#### Objectives

Provide customers, staff and external stakeholders with clear and timely communications about:

- Services that will not be available during the cutover
- Timings of when they will happen so they can prepare and act early
- Advise customers what they can do during cutover

During the cutover ensure:

- We have clear messages about what services are unavailable and when customer services will be available
- Advise customers what they can do during cutover
- We are prepared for media attention and social media feedback and are able to answer their questions quickly and effectively

#### Key messages

Our key messages will be tailored appropriately to the audience and channel:

#### **External key messages**

#### Prior to closedown - from September 2021

• Key services will be unavailable from 4pm Thursday 21 October until start of business Thursday 28 October, while we take another step toward making tax more straightforward for people in New Zealand.

- During this time myIR secure online services and Gateway Services will be unavailable and our phone lines will be closed.
- Over this period, we'll move information from our old computer system to our new system.
- If you have drafts saved for returns or secure mail in myIR, make sure you finish them before 4pm on Thursday 21 October. This way you will not lose them, as they will be deleted after this deadline.
- For more information visit ird.govt.nz/service-update

#### Additional message for Working for Families, child support and Paid Parental Leave

Working for Families/PPL customers:

Due to our planned shutdown on Thursday 21 October, weekly Working for Families and fortnightly Paid Parental Leave payments will be paid early, on either Wednesday 20 October or Thursday 21 October. This is the payment you would normally receive on Tuesday 26 October or Wednesday 27 October.

#### Paid Parental Leave customers:

Receiving their fortnightly payment a week early means they will then wait three weeks for their next scheduled payment. We'll be emphasising this in our comms out to this group

#### Child support customers

Payments will be made on Wednesday 20 and Thursday 21 October and should arrive in your account on Thursday 21 or Friday 22 October. Our online services will be unavailable from 4pm Thursday 21 October until start of business Thursday 28 October.

#### Additional message for GST filers

Monthly and bi-monthly GST payments, returns and provisional tax instalments are due by 28 October.

PLEASE NOTE: Our online services will be unavailable from 4pm Thursday 21 October until start of business Thursday 28 October. Please plan ahead and file in advance of the due date, if possible.

If you're unable to pay due to COVID-19, you have options. Get in touch so we can help. Find a list of key dates here https://www.ird.govt.nz/index/key-dates

\*\*Message to add when we re-open: GST payments and returns are due today. If you still need to file, you can do so until the end of today, Thursday 28 October, before late fees apply.

#### Additional message for employers completing payday filing

Employment Information (EI) returns for Payday Filing that are due over the closure can be filed early, if you're able. The days during the temporary shutdown will not count as working days for filing periods.

Filing can be completed up to 4pm on Thursday 21 October and can be resumed from the start of business on Thursday 28 October.

# During the closedown - 4pm Thursday 21 October to start of business Thursday 28 October

- We're making improvements to our systems.
- While we do this work:
  - myIR Secure Online Services and Gateway Services are unavailable until the morning of Thursday 28 October
  - our phone lines are closed until the morning of Thursday 28 October
- You can still do some things during this period including:
  - pay your bill as you normally would through your bank account
  - access information on our website.
- We apologise for any inconvenience this may cause and thank you for your patience while we make these improvements.
- Note about GST due dates as above.
- Note about WfF, PPL and child support payments as above.

### Internal key messages

Similar to previous START releases, systems will be shut down on the afternoon of Thursday 21 October and will come back online early on Thursday 28 October. We will be closed to customers on Friday 22, Saturday 23, Tuesday 26 and Wednesday 27 October. The contact centre and myIR will not be available during the shut down.

#### Objectives

- We'll design our communication approach in collaboration with key stakeholders.
- Our customers are always 'front of mind'.
- We'll use our communication principles; simple, open and certain in all our communications.
- We will use existing internal and external communication "business as usual channels" wherever possible to ensure cost effectiveness.
- In order to maintain our reputation as a trusted administrator, our focus will be on providing information about the cutover to the right people and organisations at the right time.
- We'll inform IR people first, so that they are able to effectively respond to customer queries.
- We'll work with the media and social media teams to ensure they have information at hand to respond to the most likely media and social media queries.

Channel	Message and resource/approach
Direct mail or electronic direct mail	<ul> <li>Close down messaging incorporated into relevant, planned direct customer communications (email and letter) including file early messaging to GST customers.</li> <li>We will avoid sending any communications that will drive customers to contact IR during the</li> </ul>

#### **Communication channels – Customers**

Channel	Message and resource/approach
	week leading up to and cutover
	(except for GST customers).
<b>Website -</b> (including homepage banner, dedicated close down landing page: ird.govt.nz/service-update and other sections of the IR website), alert banners across all webpages.	<ul> <li>Key messages incorporated into dedicated close down landing page.</li> </ul>
	<ul> <li>Banners with key message about service availability on all IR webpages, myIR pages, special dates pages, service-update page.</li> </ul>
Social media – Facebook, LinkedIn (Tax Pro and Corporate), Twitter During cutover social media will be one of our only outward facing communication channels available to customers for reference purposes only. We will monitor all IR social channels for emerging issues and use back pocket responses to reply only if urgent. Outage post will sit at the top of social pages directing customers to our website for more information.	<ul> <li>Schedule a range of posts across IR's social media channels informing customers of the close down dates linking to the campaign landing page. Pin posts to top of social media pages where possible. Including reminders for GST and WfF/PPL and child support customers. These reminders will be targeted specifically to these customers.</li> <li>Our standard terms of use will be in place to guide how we respond to comments.</li> <li>We won't publish social posts (native or promoted) directing customers to myIR in the period immediately before close down and during the closedown period. In- market campaigns will be put on pause, particularly those driving customers to use myIR. Except for GST and WfF customers as applicable.</li> </ul>
BT Account Management	• A separate BT Account Management plan has been developed and is currently being deployed.
Media	<ul> <li>Work with media team to implement strategy for managing media before, during and after system closedown.</li> </ul>
Front of house screens	Slide in front of house presentations incorporating close down messaging
<ul> <li>Internally produced newsletters</li> <li>Agents Answers</li> <li>Tax Agent Issues</li> <li>Transformation News</li> </ul>	<ul> <li>Close down messaging incorporated into BT Stage 4 articles in lead up to close down.</li> </ul>
myIR message banners – across sections linked to FIRST and START	<ul> <li>Use relevant banner locations to inform customers:         <ul> <li>of close down dates</li> </ul> </li> </ul>

Channel	Message and resource/approach
myIR outage page during close down.	<ul> <li>that any draft requests will be deleted</li> <li>of any other relevant impacts of ramp down that are identified.</li> </ul>
Voice message (Spk2IR)	<ul> <li>Voice message at the front end of all phone calls to IR contact centres informing customers of close down dates and bespoke messages for GST and WfF/PPL customers.</li> <li>Voice message during close down informing customers when we will be open and what they can do while we are closed.</li> </ul>
Webinars	<ul> <li>Incorporation of slide in existing presentations detailing cutover dates</li> </ul>
Advertising	<ul> <li>All advertising related to BT release will be paused prior to cutover.</li> </ul>

## Communication Channels – External Stakeholders

Channel	Message and resource/approach
Briefing Note to Minister	Messaging around the shut down and afterwards explaining the results.
Email from Commissioner to key stakeholders	Messaging around the shut down and afterwards explaining the results.
Face-to-face/ phone call briefing notes – Account Management	Messaging around the shut down and afterwards explaining the results.
Transformation News (external)	Key messages around the cutover – reminders of what won't be available etc
Emails to tax agents/social (LinkedIn for Tax Agents showcase page) plus MBIE business newsletter	Clear messaging around what will be available and when.

## **Communication Channels - Internal**

Channel	Message and resource/approach
Snapshot	Details of systems that will not be available
Intranet home page	Featured News containing important messages around cutover
People Leader Messages	Important reminders for leaders
BT Intranet pages	List of all systems impacted by outage
Email	Key messages around the cutover

START Broadcast message*	Staff working in START will be told when to log out. E.g. START will be shutting down at 4pm, please log out after you have completed your call.
Transformation News	Important reminders regarding the shutdown
BT Leaders' Update	Important reminders regarding the shutdown
BT Monthly Information PowerPoint pack	Important reminders regarding the shutdown
Key users	Fully briefed key users will be available to answer questions