Inland Revenue
Te Tari Taake

Business Transformation

Customer Engagement Approach for GWS design

BT DX Sub-programme, Digital Ecosystem Services

March 2019

DES Engagement Plan

Purpose

- This brief describes how & when IR will engage with various customers groups w.r.t. R4 GWS scope.
- It only covers 1:n services where we intend to collaborate (either co-define or co-refine) with a variety of externals to ensure a robust, meaningful set of services are created.
- The approach aligns to other documents such as:
  - BT Internal and External Stakeholder Engagement Plan and Internal Communications Plan for START Release 4 (D-xxx, due March 2019);
  - BT Account Management Strategy;
  - Release 3 Income Tax DES Engagement Approach;
  - BT KiwiSaver Scheme Provider Engagement Plan.
- The inputs (and outputs) from this engagement plan are created from (and inform) standard BT / DES deliverables such as:
  - BFDs;
  - Solution Blueprints;
  - Build Packs;
  - BST Scenarios.

Recommendation

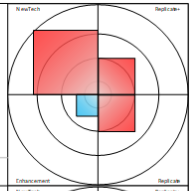
- The DX Sub-programme recommends that the TEWC **endorse** the proposed engagement approach and plan

GWS R4 Scope Summary

KiwiSaver

Large body of work with high effort and high complexity. High volume interfaces that will be redirected from FIRST to START. Replacement services for these interfaces will be co-designed with KiwiSaver providers and made available post R4 go-live (same approach as e-File).

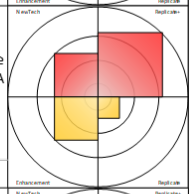
Onboarding Effort M *Co-Design Effort* H



Tax on Income

Continuation of work on replacement of e-File will involve substantial co-design effort across accounting and practice management software providers. Interface enhancements will also be delivered for MBIE, DIA and LINZ and Gateway Services will eb extended to give a more comprehensive coverage of return types.

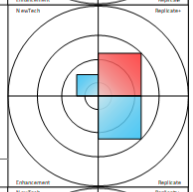
Onboarding Effort M *Co-Design Effort* H



Student Loans

Development profile for these interfaces is primarily migrate and enhance but with a small, targeted set of new services on new technology. Area characterised by many different partners and providers.

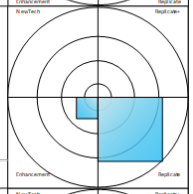
Onboarding Effort L *Co-Design Effort* L



Infoshare / Suppliers

Primarily conversion of existing services. Many interfaces with lower complexity than most other areas of the portfolio with the possible exception of some payment services

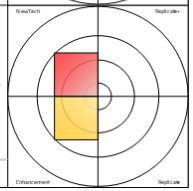
Onboarding Effort L *Co-Design Effort* L



Gateway Services

Extension of enabling capability that supports partners and providers in the Developer Portal and FAST Gateway. Changes to the Developer Portal will increase self-service capability for consumers of IR services. Co-design effort on improved interfaces with the financial sector that align with the Open Banking Standards. Significant onboarding effort across many different areas.

Onboarding Effort H *Co-Design Effort* H



[Information redacted]

GWS Scope vs Engagement Approach

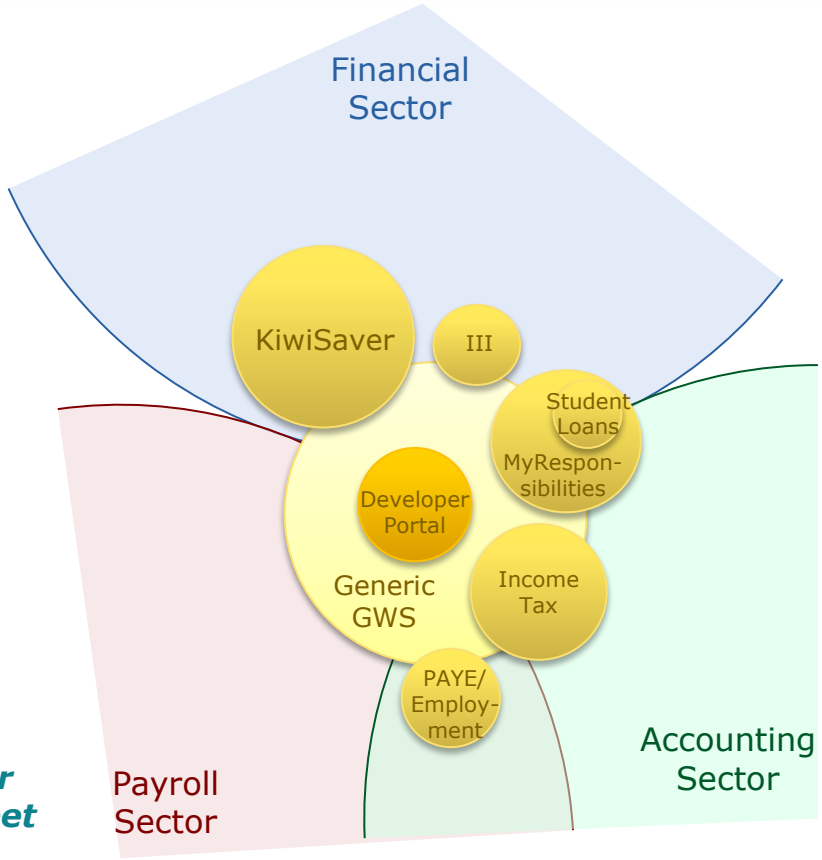
Release 4 scope has been defined at a **product level**; GWS delivery activities will also be scheduled in this way:

- KiwiSaver Transition, Replacement, New Services
- Income Tax Alerts, Notification, Information etc
- Tax at Source Employment, PAYE, III etc
- MyResponsibilities Replacement for the My Tax function
- Gateway Capability Developer Portal, Test Services, Service Now etc

HOWEVER, we will often use **generic solutions** to meet multiple customer needs e.g.:

- MyResponsibilities might cover "what's my SL balance" as well as "how much tax do I need to pay via internet banking";
- TDS might cover transactional information for KiwiSaver History as well as Tax Accounting;
- The same Alerts service might be used for PAYE employers as well as Income Tax agents.

Where appropriate, we will engage across customer groups, especially to create generic services that meet multiple segment / product needs



Note:

We will leverage appropriate customer research (surveys, data analysis, industry engagement etc) to understand the priorities and needs of end-users of any gateway service, e.g.

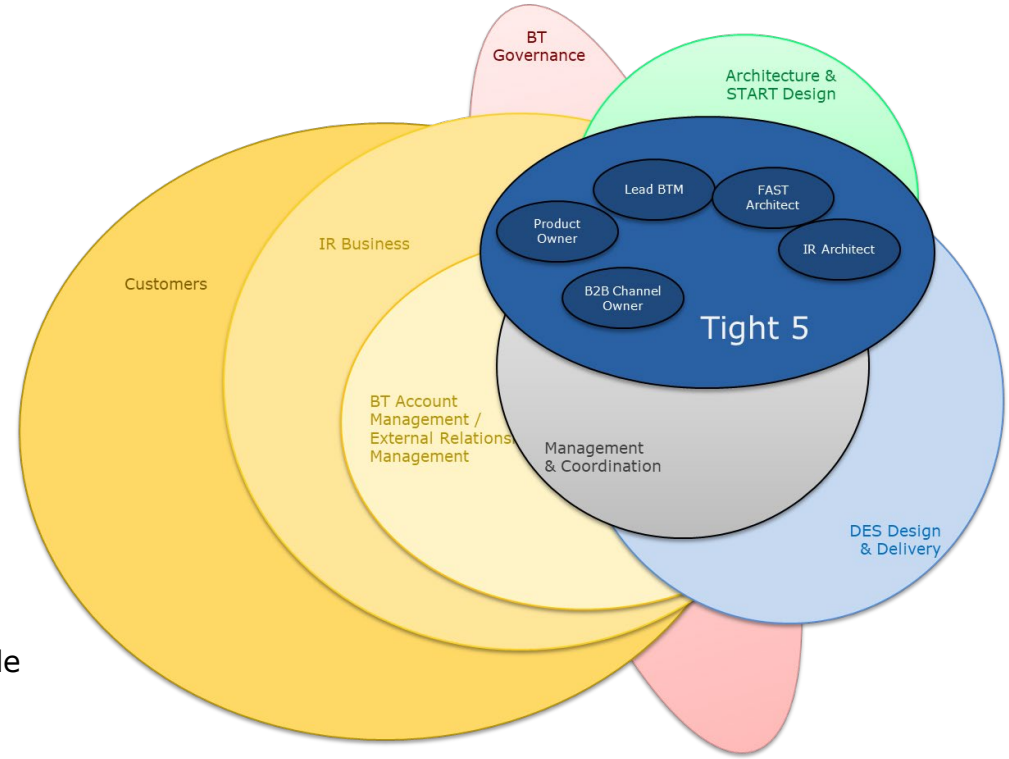
- Tax agents who use practice management software;
- Employers who use payroll software;
- Student Loan customers who use internet banking.

However it's important to remember that GWS are *wholesale services* – it's up to the connecting party to decide how to represent the information in their systems and/or to their customers; and to test appropriately!

GWS Engagement Environment

Stakeholder models are complicated

- Lots of players – BT, IR and *customer*
- Some are involved in many topics
  (Channel Owner; Architects.
- Others only in one or two
  (certain Product Owners and Account Managers.
- All of them have other jobs to do as well
  (BAU activities; Release 3 delivery;
  R4 core START / myIR design; *other compliance work*;
  own business priorities!)

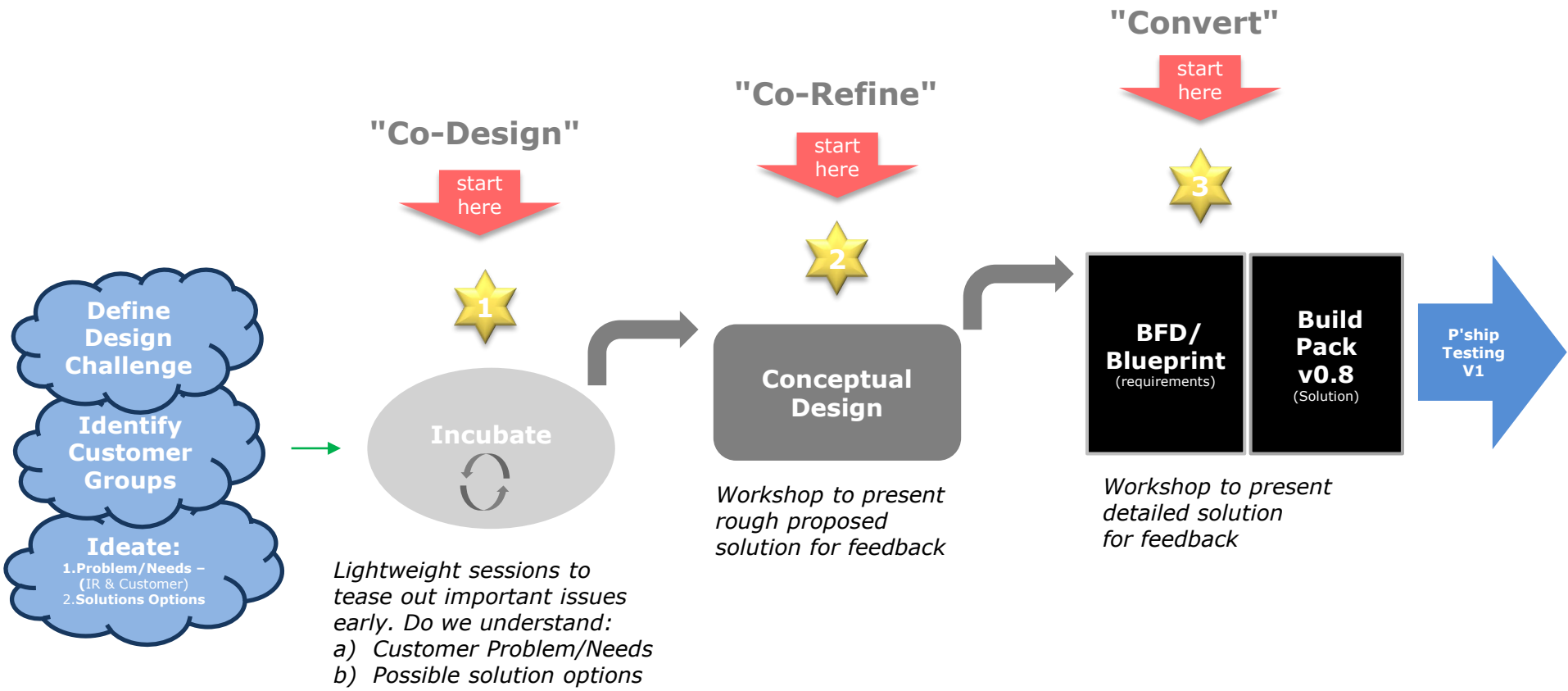


Tight 5 Engagement Leads for each topic ensures:

- our **design leaders are aligned** on priorities, design, schedule and resources;
- we are aligned on how – and if/when! – to **seek customer insights** to inform the best possible design;
- we **maintain momentum** on key customer-facing issues that need to be resolved and/or escalated to BT governance (especially DA/EWC);
- **light-touch, high value**; lots of detailed work is happening behind the scenes!
  - For big ticket items we'll have a fortnightly 1-hour meeting (KiwiSaver B2B, INC GWS);
  - For lighter-touch items we'll have a monthly 30min meeting (PAYE, Dev Portal) or hook into existing project meetings (myResponsibilities).

Design Approach

A consistent approach with different entry points depending on whether the outcome requires a deep "co-design", moderate "co-refine", or light "convert" design approach:

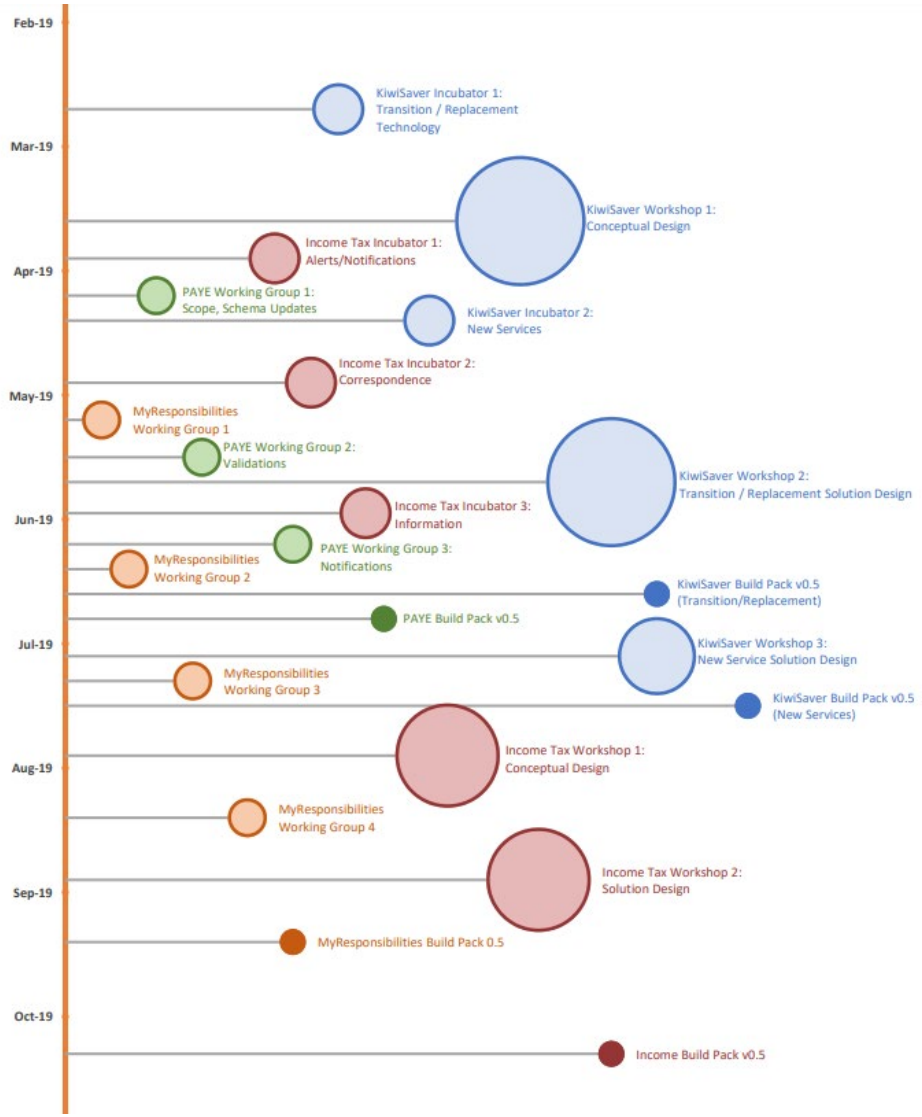


Rules of engagement

Starting point and boundary lines for co-design and co-refine are:

- Agreed scope items only (where do we re-list this?)
- No change to IR's role in service value chain unless pre-agreed
  - REF: IR's role in Kiwisaver service value chain and need for prior agreement on this
- Service design alignment with IR target outcomes
- Service design in accordance with approved design patterns and architectural guidelines
- No design choices or promises made in workshops (we always adhere to BT design governance)
- Service design has to contemplate change and adoption effort for all impacted parties
- No delivery commitment to partners prior to approved design
- Impartiality and level playing field for all participants

GWS Release 4 Engagement Timeline



Ensuring coverage in engagement models

- Lots of people support multiple R4 engagement topics
  e.g. William, Ryan, Tim, Karen, Coordinator
- and/or they are handling R3 in parallel
  e.g. Annabel, Mat, Tania, Returns SMEs
- We can't practically manage >1 engagement per week
  so need to plan this out carefully up-front!
- We need to book IR and Customer attendees as well as venues well in advance!!

This schedule takes into account:

- R4 design completion deadlines
  e.g. KiwiSaver transition build starts in June; but Income Tax GWS build starts in October
- R4 scope priority
  i.e work on Must Do before Should Do
- R3 activity by customer group
  e.g. Accounting SWDs are busy with E-File and TDS
- Method by service
  significantly less engagement for Convert compared to Co-Refine or Co-Define

Legend
- Size of bubble = size of engagement
- Colour = initiative stream

Kiwisaver
Tax on Income
PAYE
My Responsibilities