



**Inland Revenue**  
Te Tari Taake

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# **Haukāinga (Intelligent Information Project) Change Management & Communications Case Study**

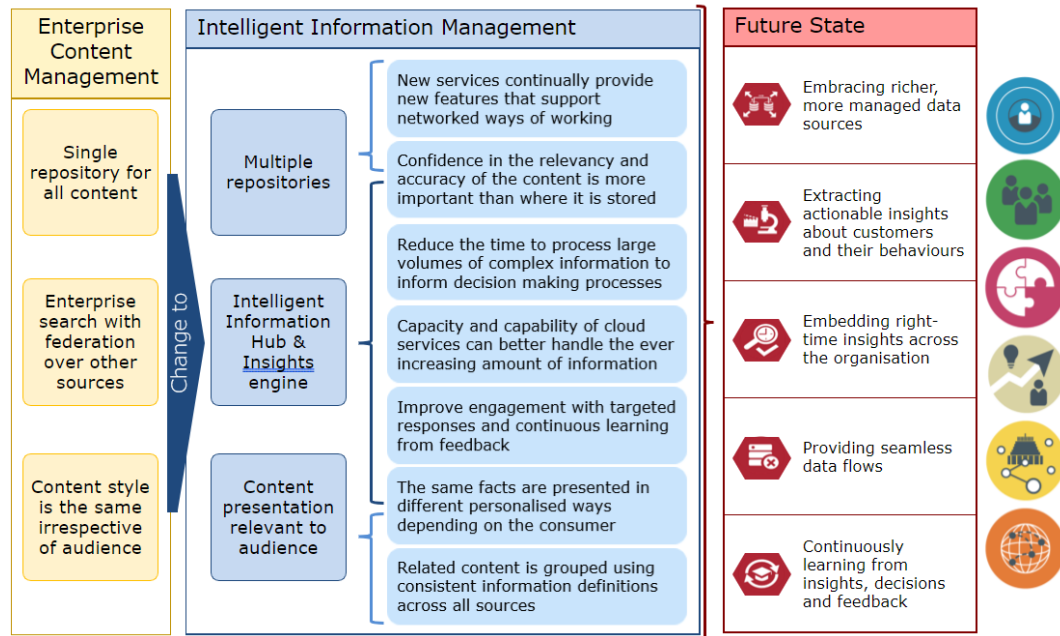
Domain Principal – Change Management, ED&I  
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21/12/2021

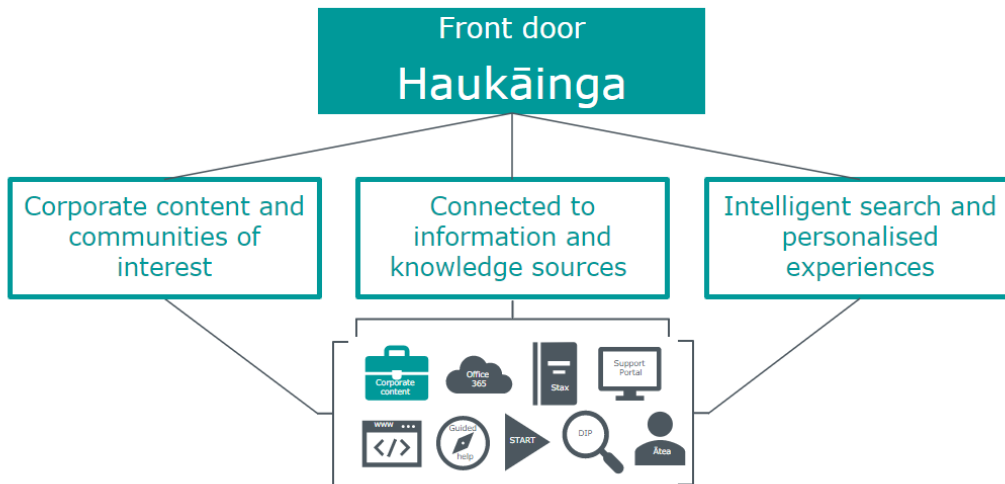
## What were we trying to solve?

Business transformation had delivered a range of new IKM tools and capability, however there were still some challenges to be addressed to ensure our people could access the information and insights needed to perform their roles more effectively:

- Existing intranet platform to be retired and content to be moved to new Corporate Space in Sharepoint.
- IR Knowledge Base also needing to be transitioned from existing platform and START Help did not have the functionality to offer a guided help experience— a new solution needed.
- Multiple new systems for managing documents and information but not yet integrated, and confusion about which tools to use for what purpose (e.g. collaboration, short/long term storage).
- No effective search engine that could operate across source systems or provide intelligent search functionality.



Haukāinga – our true home, will become our way to find and discover information that is relevant to us.  
To enable the vision, a place for our people to connect and find the enterprise wide information they need.



Stage 1 – Developed guided help for a small number of high-use topics. Expanded use of guided help to customer facing website.

Stage 2 – Move from IRIS to Corporate Space, and the new homepage 'Haukāinga'. Connected search functionality to corporate space Sharepoint.

Stage 3 – Connected up STAX and other information sources.

Stage 4 – Refined and improved the search functionality. Development of Te Mātāwai knowledge centre and move from IRKB.

## Stage 1

### Guided help

Oct - Mar 2020

An intuitive pathfinder that assists our people in reaching positive outcomes for our customers

## Stage 2

### Refreshed Intranet

Apr - Sep 2020

Updating corporate content, introducing new home page with search capability, connecting this to several key information sources

## Stage 3

### Connecting information

Oct - Mar 2021

Connecting additional information sources, updating other intranet content

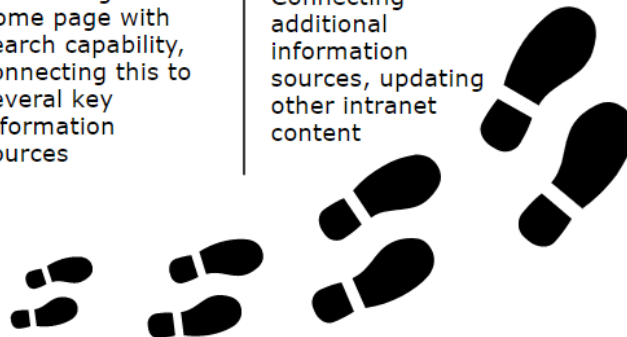


## Stage 4

### Assisted intelligence

Apr - Sep 2021

A smart enterprise search capability offering content relevant to you





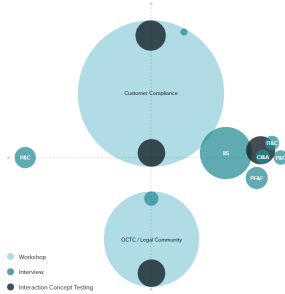
## Experience Led Approach

The core concept of Intelligent Information is delivering the right information, to the right person, at the right time, in a meaningful way.

An Intelligent Information solution should consider how data can be utilised to understand what information is relevant to who, when, and where, and deliver on this. However, more importantly, the experience should be informed by the behaviours, motivations and complexities around accessing and using information of people at Inland Revenue. By understanding these two components, we can deliver purposeful and smart interactions which meet user needs.

We call this approach "experience led design".

As co-design is a core principle of an experience led approach, a number of user representatives and subject matter experts across Inland Revenue were engaged throughout the development of this work. For the Envision phase, this included interaction concept testing with CSOs, Technical Specialists, Solutions and Internal Auditors to validate the feasibility of the Intelligent Information capability recommendations across Inland Revenue.



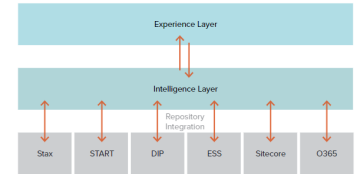
## Delivering Intelligent Information

The purpose of this work is to provide all people at Inland Revenue better access to information, helping them to perform tasks more efficiently while facilitating curiosity to ultimately increase performance across the entire organisation.

Inland Revenue has identified the need for an Intelligent Information solution which provides a centralised, personalised and intelligent point of access to information and data from multiple repositories. We use a conceptual model to outline the three key elements required to deliver this solution: an Experience Layer, Intelligence Layer and Repository Integration.

The Experience Layer provides the above the line experience and enables users to interact with information through an interface which in turn inform the recommended experience capabilities.

The below the line experience includes the Intelligence Layer and Repository Integration, which together inform the intelligence and integration capabilities. The Intelligence Layer refers to the 'smarts' that will enable the future solution to deliver the right information to the right person at the right time. Repository Integration considers how the information and data the system utilises is stored and accessed based on where it is housed, primarily in relation to the six enduring repositories identified by Inland Revenue.



- The IR project team worked in partnership with an external vendor, who led the experience design/co-design using an AGILE methodology.
- Their experience led approach involved conducting workshops and interviews with a range of people from different parts of IR.
- These were followed by interaction concept testing in which participants were observed while using the new tools and changes were made based on their feedback.

## What Success Looks Like

Objectives and benefits have been determined in accordance with Inland Revenue's organisational priorities.

Following the Intelligent Information solution design, these success measures should be interpreted by individual Business Units and translated into appropriate and measurable KPIs.

|   |   |  |  |
|---|---|--|--|
| <b>Right Information, Right Time.</b><br>Provide access to and deliver relevant information to people in one place.                           | Reduce time to resolve queries.<br>Increase consistency and accuracy in response.                             | <b>Managing Information</b><br>Provide a common language that describes information across multiple repositories.  | Reduce effort required to relate information.  |
| <b>Consistent Information.</b><br>Provide prompt, trusted, relevant and current information.  | Increase completeness.  | <b>Collaborative Ways of Working</b><br>Enable participation in the development and use of information.  | Increase staff engagement.   |
| <b>Complete and Related Information</b><br>Provide access to and related information to provide a more complete view.                         | Reduce time reviewing and analysing.  | <b>Sustainable and Extensible</b><br>Provide "as a service" capabilities that a supplier can improve, adapt and integrate with other Inland Revenue services.                            | Reduce need for bespoke development to ensure services are continually improved.   |
| <b>Reputational Risk Mitigation</b><br>Provide accurate information to customers that aligns with and informs publicly available information. | Reduce customer complaints.<br>Increase customer satisfaction.<br>Increase ability for customer self service. | <b>Pragmatic</b><br>Provide replacement storage options for content housed on the Intranet and the IR Knowledge Base using existing technologies without the need for licensing changes. | Increase breadth of use in existing capabilities.<br>Reduce overall administrative, training and support overheads by gaining efficiencies across teams. |
| <b>Information Access</b><br>Enable access to information in a way that promotes reusability.   | Increase repurposing.<br>Increase consistency and transparency.<br>Reduce time to share findings.             |  |  |

# Change Management Approach

- Haukāinga had a broad impact: all IR staff would see a change, but for most the impact is low-medium – they will still have access to the information and systems to do their job and there are no changes to our core systems. Exceptions to this were for our content editors and owners who needed training in Sharepoint.
- The aim of the change management approach was to have an ‘organic’ uptake of Haukāinga by targeting influential groups, team meetings, webinars and word of mouth – ‘actively engage’ rather than be ‘told to use it’.
- Our approach was to be business led and to enable people to become familiar with the change in a way that didn’t consume a lot of time or effort by our people, in particular our team leaders and front-line. There were also major releases for START happening in the same timeframes, alongside organisation design changes, building disruptions and Covid. Old sites and tools were still available for a period so low risk as people still had access to what they needed.
- Low key did not mean low effort from a change communications perspective – there was a significant amount of work put into developing effective communications and stakeholder engagement throughout the project.
- The change management method was to do an initial high-level impact assessment based on user groups, then a mini impact assessment and change plan for each phase/launch as the solution was developed e.g. Corporate Space, Guided help, Haukāinga, Connecting Up. This approach meant we were able to adapt and tailor activities for each phase and learn from previous phases.
- Engagement with people in the business, particularly CCS/contact centres was critical to determine how big a change this was and how much effort needed to be put into supporting people e.g. through training, communications, info packs etc.
- Our change manager attended UX sessions to see how people were using the new tools, what they were finding difficult, how they reacted. The new system was shown to be easy to use and navigate, and features could be changed/added easily based on user feedback.

## Haukāinga Overview

[IN CONFIDENCE]

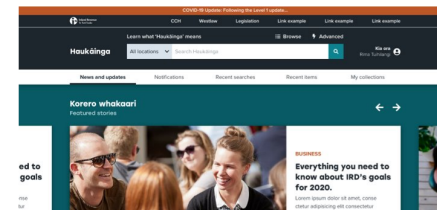
The following detail impact has been developed for Stage Gate 2: Refreshed intranet (March 2020 - October 2020) While this stage will provide the same experience to all IR staff, there may be a need to provide targeted information to each audience content compliance, technical and back office people, depending on how relevant the search information is for their job and how relevant the subsequent releases are to their role. Call outs for specific messaging is outlined throughout the impact assessment.

The initial introduction to Haukāinga will focus on replacing the IR’s current intranet with IR’s new digital home. This is a new central place to launch tools, get news and search information.

We aim for Haukāinga to have an ‘organic’ uptake by targeting influential groups (working smarter, blue crew) team meetings, webinars, ‘word of mouth’ and feedback to progressively increase uptake. This will be an alternative solution to the current intranet for news however people will have the choice of using either tool for searching information.

Any IR person can access it, as it will not be restricted but we want people to actively engage with it rather than be forced to use it. The change approach will be light touch due to the intuitive nature of Haukāinga search capability.

The search scope initially will be our public and tax technical websites, guided help, corporate content & a set of SharePoint sites to be confirmed. Future rollout approach is still to be defined based on the content creation strategy and prioritisation of project deliverables.



### Dependencies and considerations

- Ability for the project support and defining the support process and roles. This includes ELS and operational support.
- IRM privacy education material for foundation learning on Understand Information Privacy, Security and Te Tiriti (Information Ethics) & How to manage my own information (best practice).
- User navigation experience between Haukāinga, corporate content and old intranet is an easy experience.

[IN CONFIDENCE]

| Change           | Impact Description  | Detail impact  | Impact Rating |
|------------------|---|--|---------------|
| <b>Impact</b>    |   |  |               |
| <b>Haukāinga</b> |   |  |               |
| <b>Homepage</b>  | Our IR people will have a new central place to launch tools, get news and search information.   | <p><b>What’s the change?</b></p> <ul style="list-style-type: none"> <li>New homepage called Haukāinga – cultural pillar for IR.</li> <li>Not all information will be accessible from Haukāinga from day one.</li> <li>Our IR people will need to know what’s available where and how to get to them (TBC).</li> <li>IR updates will combine system Incident alerts and internal business emergency alerts (TBC).</li> <li>Consolidation of IRs links to other systems. (most useful ones TBC)</li> <li>Our IR people need to access previous news articles (solution to be determined)</li> <li>Accessible at any time from any device</li> </ul> <p><b>What’s the same?</b></p> <ul style="list-style-type: none"> <li>Yammer feed</li> <li>News</li> </ul> <p><b>Messaging and education considerations:</b></p> <p>Content on old intranet won’t be searchable through Haukāinga but will be able navigated from corporate space landing page. Depends on the corporate space experience, it may be possible to search from Haukāinga. (TBC)</p>  | Medium impact |
| <b>Search</b>    | Our people will be able to search across multiple locations from Haukāinga homepage.<br><br>There is no comparable experience within IR at present. | <p><b>What’s the change?</b></p> <ul style="list-style-type: none"> <li>Our IR people will be able to search content from the public website, tax technical website, guided help, corporate content &amp; SharePoint sites TBC.</li> <li>Our people will be able to search across multiple locations. There is no comparable experience within IR at present.</li> <li>Our IR people will need to change how they retrieve information, instead of using links and dropdown navigation may just use search instead</li> <li>Our IR people will need to understand what information they can search, more than corporate content</li> <li>Our IR people will be able to choose which location to search (all locations or selected)</li> <li>Search suggestions and content items will be predicted based what’s been inputted into the search box</li> <li>Content headings and content within documents will be searched and results will display with both</li> <li>Once our IR people click on content and go to the native repository, there will be a need to know how to go back to Haukāinga (will open in a new tab)</li> <li>Bookmarking</li> </ul> | Low impact    |

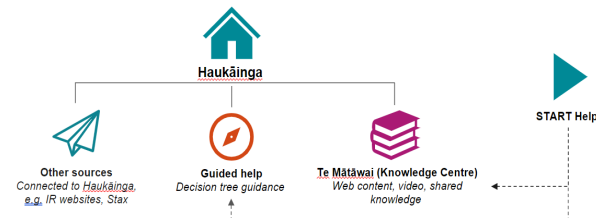
# Change Management Approach

- The key behaviour change required was to get our people to use the search functionality rather than navigating through links (search first). This is important as the search function can return a lot of information from the different sources that are connected up to Haukāinga, and some existing links would no longer be available (although a number were retained e.g. Links to MIRI, ATEA, START). Up to this point there had not been an effective search engine on the IR intranet, and other repositories such as STAX, sharepoint were not connected.
- Based on our impact assessment and user experience testing, we determined that training not required for anyone except content editors - instead we did demo videos and supporting FAQ's for Haukāinga and guided help. The CCS team also did their own videos to support and communicate with their teams.
- Work was also done with the IKM team to raise awareness about privacy/security - ensuring source documents were correctly classified in the native systems, being open about the data that is collected by the Haukainga platform e.g. What is being searched for, frequency etc. - a rich source of information to help with refining functionality and seeing how people are using the tools but not at an individual level.
- Corporate space - used 'content owners' to update content, trained them in how to use Sharepoint to edit/maintain their content.
- The switch over to Corporate Space, with the launch of new Haukāinga home page and search functionality was the most visible component....but transition was designed in a way that everyone still had what they needed until they got used to the new sites.
- We used a 'soft launch' approach for guided help initially, choosing a few topics to begin with and encouraging people to try using the new tool.
- The full launch of Te Mātāwai in July 2021 took place with the tax and social policy content transitioned from START help, again with an approach of encouraging use and gradual uptake with START help still available for a period. From October 2021 the Tax Law Community Site was migrated, as well as new sites for Child Support and Tax Technical Quality Assurance. The Child Support cohort were the first group to go through their START training using Te Mātāwai.

| [IN CONFIDENCE]<br>IIP stage 2 go-live – change and activity |   |  |   |
|--|---|--|---|
|  | August  | September  | October   |
| Stakeholder engagement                                       | <ul style="list-style-type: none"> <li>Change Champions</li> <li>Key User Network</li> </ul>  | <ul style="list-style-type: none"> <li>Update to ELT</li> <li>Update to CCS LT</li> <li>Update to Unions</li> <li>Change Champions</li> <li>Key User Network</li> </ul>  | <ul style="list-style-type: none"> <li>Change Champions</li> <li>Key User Network</li> </ul>  |
| Change activity  | <ul style="list-style-type: none"> <li>Detailed Impact Assessment</li> <li>Change Plan</li> <li>Analysis of content editor</li> <li>IKM, WTS &amp; Internal Comms engagement</li> <li>Development FAQs</li> </ul> | <ul style="list-style-type: none"> <li>Development FAQs</li> <li>Training: Internal Comms</li> <li>Training: IKM</li> <li>Training: WTS</li> <li>Development &amp; sign-off of user guide</li> </ul>               | <ul style="list-style-type: none"> <li>Development of demo videos</li> <li>Publish demo videos</li> </ul>   |
| Org-wide communication                                       | <ul style="list-style-type: none"> <li>Featured news draft, sign-off &amp; publish</li> <li>Webinar 3 Prep: content, promo etc</li> </ul>   | <ul style="list-style-type: none"> <li>Webinar 3</li> <li>Corporate space banner publish</li> <li>Corporate Space Yammer post publish</li> <li>Webinar 4 Prep: content, promo etc</li> </ul>                       | <ul style="list-style-type: none"> <li>Webinar 4</li> <li>Featured news draft, sign-off &amp; publish</li> </ul>  |
| Go-live activity   |   | <ul style="list-style-type: none"> <li>Go-live Corporate space (TBC)</li> <li>Naomi video scripting &amp; sign-off</li> <li>Meeting 'in-a-box' development</li> <li>Various DC business unit engagement</li> </ul> | <ul style="list-style-type: none"> <li>Meeting-in-a-box publish</li> <li>Record Naomi video</li> <li>Naomi video production &amp; sign-off</li> <li>Featured news draft, sign-off &amp; publish</li> <li>Go-live Haukāinga</li> </ul> |

## The tax and social policy content transition

We're working on providing simplified access to the information we need by searching in [Haukāinga](#). A major piece of work is underway to make the tax and social policy information content, which mainly resides on START Help, searchable on [Haukāinga](#).



# The communication approach

## A people-led approach to communications

In an organisation already experiencing change fatigue and a busy communication environment with many competing messages, the project was committed to ensuring communication activity was meaningful, engaging, timely and reflected the people-led approach to Haukāinga.

This meant:

- Focusing on need-to-know over nice-to-know
- Making it real for people, e.g. *This is how it will make your work-life easier*
- Making it interactive and giving people the opportunity to contribute to the design
- Working alongside influential teams to reach the right people in the right way

Often this meant thinking outside the box, rather than relying on traditional communication channels.

### Agile communications

A separate communications plan was created for each phase. Communications was the major focus of the change effort.

### Developing a Haukāinga identity

Using the IR branding, a visual identity was created for Haukāinga to ensure communication activity was instantly recognisable as relating to the project. Having already worked with the Mahutonga team to select the name, we sought their guidance on imagery and develop pronunciation resources.

### Multi-channel approach

We knew there's no such thing as a one-size-fits-all approach, especially with competing – and higher-priority – communication activity. We had a varied approach to suit the masses but also target the high priority groups.

#### INTELLIGENCE-LED

#### Watch: How we've built Haukāinga together

Haukāinga has been in development for more than a year to become our new digital home. Beginning with initial research in June 2019, 100s of people from across IR have been involved in testing, user feedback and webinar polls to make sure we end up with the right solution for IR today and into the future.

From Tuesday, we'll all have access to Haukāinga to begin exploring before it becomes our homepage later in the month. This will be just the beginning, with Haukāinga continuing to evolve – based on your feedback – over the coming year.

For now, hear from eight people who have been involved in Haukāinga, their initial impressions and what it could mean for IR as it's developed further.

[Watch 'How we've developed Haukāinga together'](#)



#### INTELLIGENCE-LED

#### Haukāinga now available to explore

Nau mai, haere mai Welcome to Haukāinga, our new online home. Like any new home, there are some final checks and smoothing of edges that need to take place before it becomes our primary residence (our default homepage), but from today you can step inside Haukāinga and begin exploring what it has to offer.

Haukāinga is our place to find IR news, check for updates and find the information you need in a connected way – something new for IR that will improve in Haukāinga over time as functionality is added.





## Making it real through gamification

Haukāinga as a concept was very new for IR, and very different to the traditional concept of an intranet. This meant it was even more important to help people understand the benefits early, so they would be in a good position to adopt the tool.

Part of this involved creating an overarching story to help people understand the core concepts of intelligence led, and the how Haukainga would fit in the ecosystem along with Stax, DIP, START, Corporate Space, and O365.

The other part was making it real and relatable to IR roles.

One way we did this was develop a workshop game for the 2019 people leaders forum. Teams were asked to take on the persona of a ComCom employee and purchase information to help them make a decision.

As the game progressed, we moved from traditional information systems (like M: Drive) to our new, more sophisticated systems (like Haukāinga). The information became more valuable to their decision making but cost them less (signifying the evolution of our data and information systems). It also helped to build understanding of how information and knowledge could be connected to users through Haukāinga to ultimately improve quality decision making.

In total, around 300 people completed the 45min workshop – leaders, union representatives and information management staff.

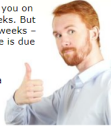
New to IR  
**Nigel**

Welcome. You've just joined IR's Community Compliance team.  
You're freaking out.

There are record numbers registered for *Right from the start* GST visits.

This could have you on the road for weeks. But you don't have weeks – your labradoodle is due to have puppies very soon.

There must be a more intelligent way to do this!



INTELLIGENCE LED


Your challenge

You don't have much time. The team administrator is already chasing you for travel dates – and Rosemary's vet is on call.

- You have eight wedges.
- These represent the Information Time you have to spend on the information you need.
- Use this information to decide how you will plan your community visits.
- You need to prioritise which regions you'll visit
- Use your team resources and information you purchase to help make your decision.



**Intelligent information hub**



**Did you know?** Inland Revenue is exploring options for technology that will allow us to search for information across major IR internal and external information sources.

We're also exploring how we can bring machine learning to our information systems, making enterprise search more intuitive and search results tailored to you and the work you do.

A proof of concept has shown us this is possible. Initial work is focused on providing a better guided help experience. New features will then be incrementally introduced to provide personalised, context intelligent information experience for IR people.

You visit the Intelligent Information Hub to find anything you can about GST and community engagement.

The Info Hub knows who you are and the kind of work you do, so before you search for anything a range of suggested documents and information sources are presented for you. They relate to Community Compliance and some of the projects your team has been working on in Hamilton.

To broaden your results, you type a few keywords into the search bar.

In an instant, a wide range of information sources display on your screen – and it's all related to the Right from the start GST visits. It seems to be ordered by relevance.

The search results include:

- A video prioritising registration for Right from the start visits and seminars
- A registration list for the 2018 Right from the start seminars and visits on **SharePoint**
- A guide within **Stax** for IR community engagement (2019)
- Plus lots of related documents.

Two items that catch your eye: A document from the Marketing team and a recent internal news story.

## Facilitating the people-led design

Communication activity helped to continue the people-led design of Haukāinga, something that had been important since the inception of Haukāinga.

With limited options for interactivity across traditional IR communication channels, the Haukāinga project became an early adopter of Teams Live and was one of the first groups to begin embedding Slido into its webinars.

Each webinar was developed with three purposes:

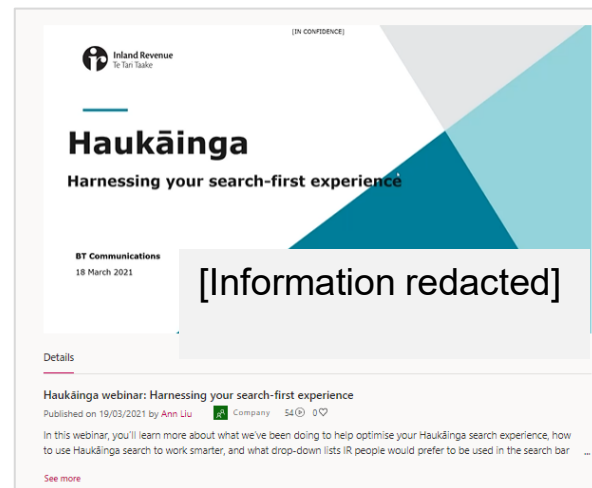
1. Show previews and recent development – *Particularly relating to outcomes of previous polls*
2. Address feedback/issues
3. Invite feedback on an upcoming design decision (

Design decisions related to new functionality, font and colour preferences, and how people prefer to find the information they need.

The results of each poll was reported back to the project team to help guide decision making.

The webinars were open to all, but particularly geared towards the change champions network as a group who could influence people in their areas of the business.

The average live viewership was ~300 people, with several hundred more watching recordings.



## Working alongside the influencers

As a project team made up predominantly of contractors, it was important that Haukāinga had an IR voice and – like the project – was delivered by IR for IR.

In some cases, that meant including quotes or delivery full communications from respected internal stakeholders. This included a one-off video update from CIR and regular updates to IIS.

Team leaders were provided with a ‘meeting in a box’ to equip them to talk with their teams about Haukāinga, as part of our ‘leader led’ change approach.

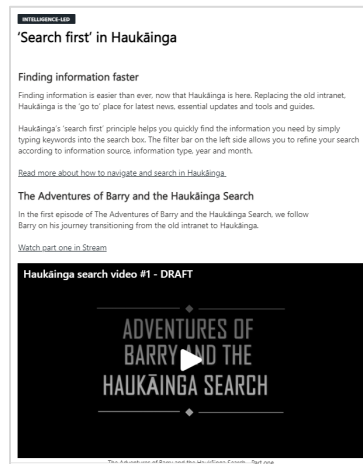
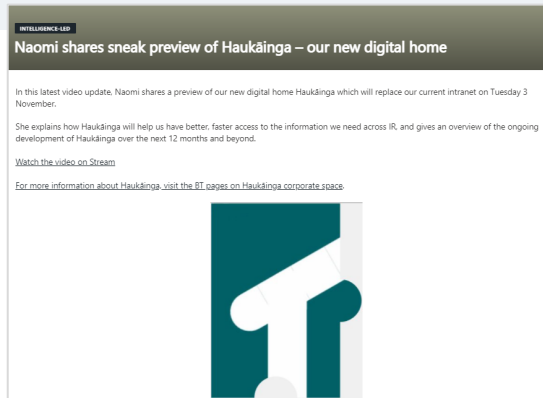
### Developed by CCS for CCS

Some of our most successful activity involved taking a lead from CCS reps. Working with representatives from CCS, we got greater insight into the communication channel and style preference of CCS people.

This led to the co-development of a series of in-house videos featuring CCS people, as well as the development of a virtual treasure hunt using puzzle pieces to encourage people to explore Haukāinga using the search functionality.

### Embedding the right search behaviours with IKM

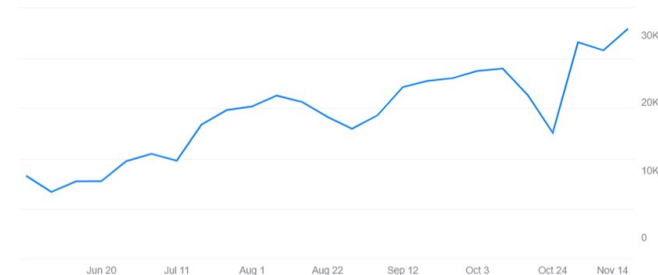
Working with the knowledge management experts within IKM, we were able to develop fun and engaging videos that promoting ‘search first’ to get people using the search functionality rather than using links/favourites – *The Adventures of Barry*.



- Use of Haukāinga, and the search functionality continues to increase steadily.
- Achieved our vision of ‘our true home’ and a seamless transition from the old intranet with very little fuss.
- Feedback on guided help/ Te Mātāwai very positive and uptake continues to grow.
- Now have ability to publish new topics at pace both internally and externally. E.g. for Covid related information.
- The team continue to refine and improve Haukāinga and Te Mātāwai.

## Analytics Highlights

- New weekly high last week: 31k searches (14-20/11)
- New daily high yesterday: 6,750 searches (22/11)



Stats for 23 May – 20 November



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**Thank you.**