



Intelligence Led Change Strategy 2020

- Draft V0.2
- February 2020

Document control

File Name and Path	SharePoint link goes here
Contact Person	Intelligence Led Change Lead
Status	DRAFT FOR REVIEW FINAL
Template Version	0.2
BT UiD	NA

Document Review History

No	Date	Change Description	Contact
0.1	19 December 2019	Document draft issued for review by key stakeholders.	
0.2	20 January 2020	Document updated following review and feedback by key stakeholders (list below)	
0.3	12 February 2020	Document updated with feedback.	
0.4			

Document Sign Off (Notes: refer to the PEP for the RACI)

Formal Review Area	Name	Signature	Date
Accountable Person	Programme Manager Intelligence Led	Signature required or endorsement by email received	
Responsible Person	Intelligence Led Change Lead	Signature required or endorsement by email received	
The following have supported the development of this document:	Change Manager Senior Communications Advisor		
The following have been consulted:	[Information redacted]		

The Intelligence Led programme brings together tools, knowledge, information, analytics and ways of working. This enables IR to realise value through the use of intelligence, insights and decision making.

IR for the future

OUR WORK 2019/20

We are becoming a more customer-centric, intelligence-led and agile organisation, focused on delivering our priorities.

WHY WE'RE HERE

OUR MISSION
We contribute to the economic and social wellbeing of New Zealand by collecting and distributing money.

OUR VISION
A world class revenue organisation recognised for service and excellence.

OUR OUTCOMES
A revenue organisation for local government programs, through greater money specific alignment of their needs.
A more mature partner they are credited to, enabling them to do things differently.
A more mature revenue organisation and working through it working collaboratively across our common environment.

OUR STRATEGIC OBJECTIVES AND TARGETS

OUR VALUES TRUST & INTEGRITY | VALUING PEOPLE | INNOVATING TO MAKE A DIFFERENCE | WORKING TOGETHER

"Information & Intelligence > Our decisions and actions – for delivering today and shaping our future – are intelligence-led"

OUR PRIORITIES

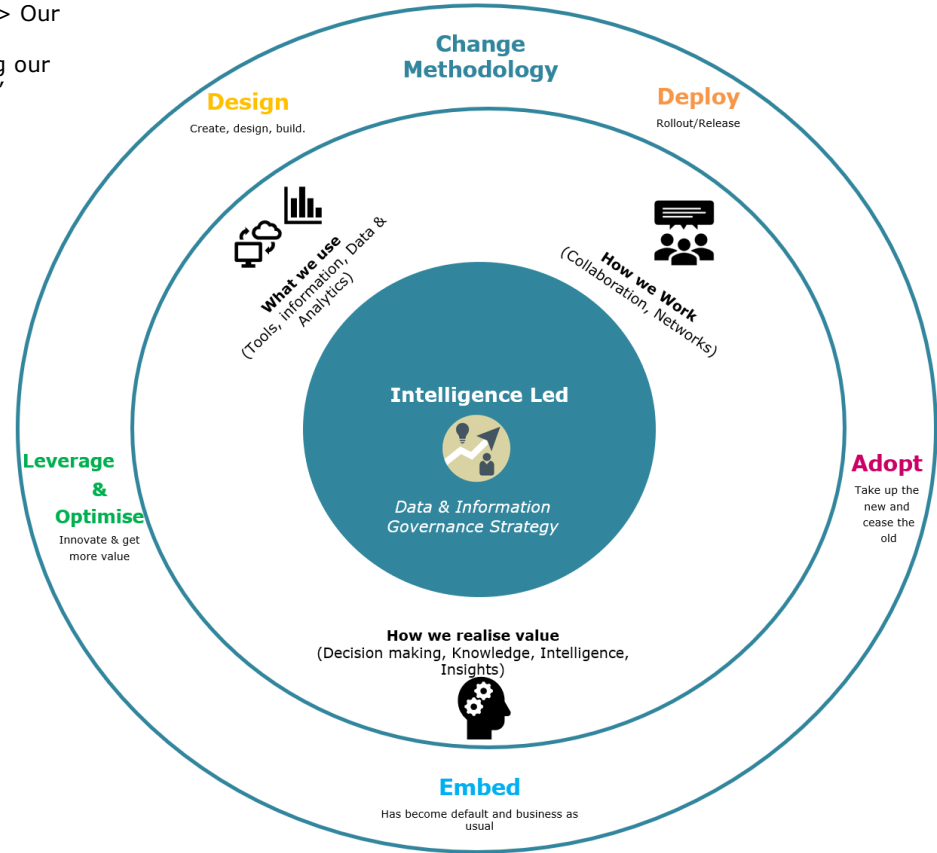
OUR 2019/2020 PRIORITIES

OUR PLANNED PRIORITIES TO 2022

Our mission: We contribute to the economic and social wellbeing of New Zealand by collecting and distributing money.
Our values: A world class organisation recognised for service and excellence.

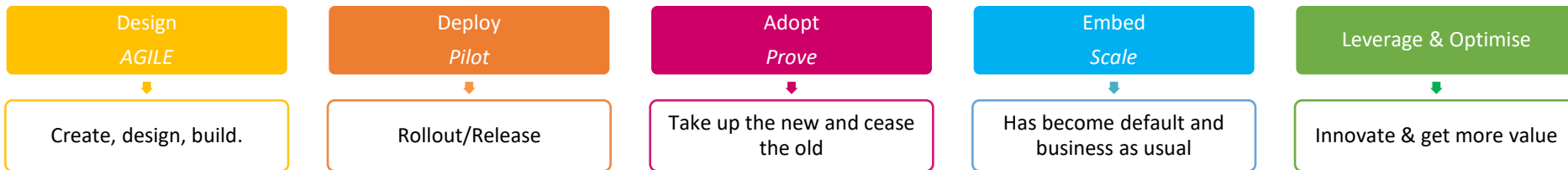
"Helping to build our intelligence-led culture"

"Incorporating our Information and Intelligence capability into everything we do"



Our technology building blocks are largely in place and we are beginning to work differently as a result, supported by our modernised data and information governance approach. Our change focus now moves to embedding and maturing intelligence led ways of working.

Our change methodology sets out the type of activities that are applied at each stage, with a focus on embedding, leveraging and optimising.

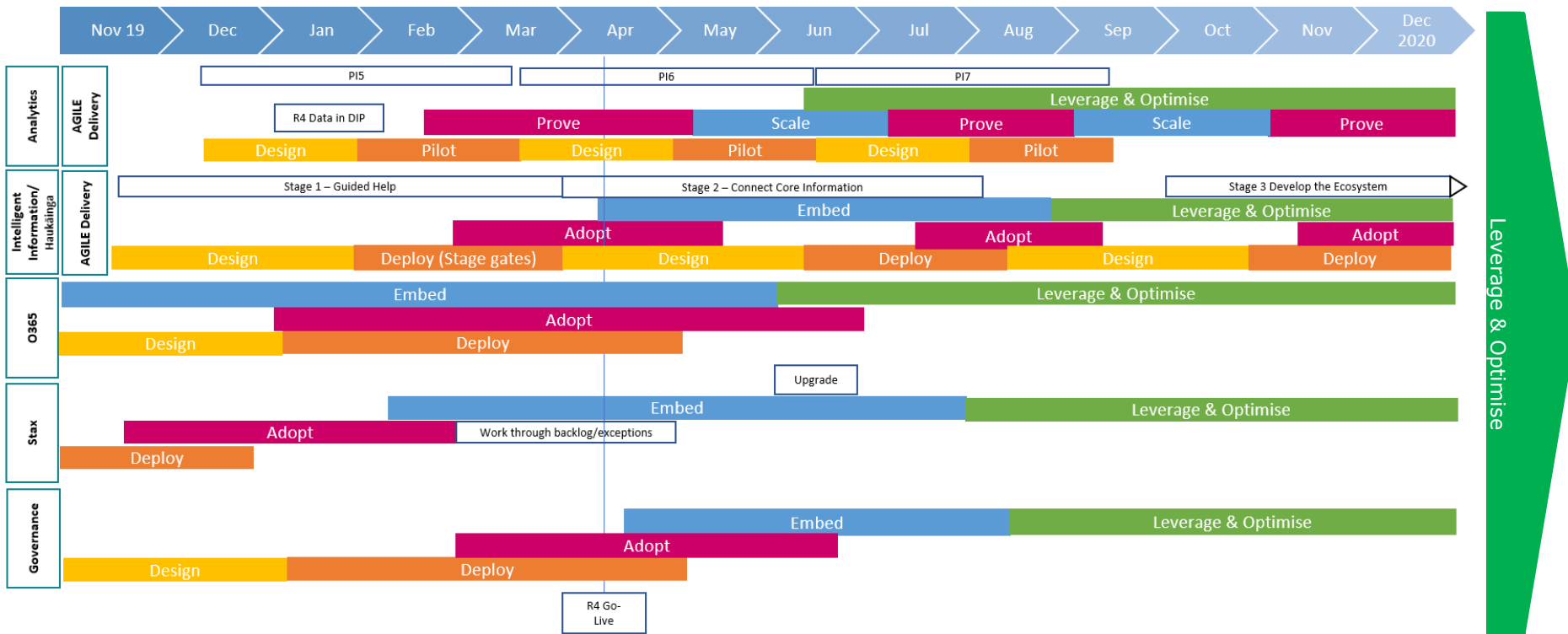


BT/Project Primary Responsibility Embedded in Business

	Design Completed	Go-Live	Our people using Intel Led tools and exploring functionality.	Utilisation, behaviour change, benefits to customers and IR.	New products or services being delivered. Step-change performance improvement.
Milestones	Design Completed	Go-Live	Our people using Intel Led tools and exploring functionality.	Utilisation, behaviour change, benefits to customers and IR.	New products or services being delivered. Step-change performance improvement.
Change Activities	<ul style="list-style-type: none"> Accessibility Pre-deployment communications Leader engagement Pilot/test Specialist/key users identified 	<ul style="list-style-type: none"> Deployment Communications Education/learning/training Early life support Specialist/key user support Leader engagement People readiness Establish communities of practice and change champions. 	<ul style="list-style-type: none"> Adoption/ behavioural change work, including supporting communications. Focus on 'early adopters' & 'early majority' users Specialist/key user support Leader engagement Post Go live assessment and Lessons learned 	<ul style="list-style-type: none"> Adoption/ behavioural change work, including supporting communications Focus on 'late adopters/laggards' Specialist/key user support Leader engagement 	<ul style="list-style-type: none"> Adoption/ behavioural change work, including supporting communications Specialist/key user support Leader engagement
Type of Measure	<ul style="list-style-type: none"> Scopes, plans, design and test completion. 	<ul style="list-style-type: none"> Deployment stats, training completion. 	<ul style="list-style-type: none"> Initial usage, training completion 	<ul style="list-style-type: none"> Utilisation, behaviour change, benefits to customers and IR. 	<ul style="list-style-type: none"> Effectiveness, productivity.
What it looks like	<ul style="list-style-type: none"> Specialists/key users developing skill and knowledge in preparation for go-live. Leaders understand change and can bring their people on board. Separate projects currently at different stages of design, deploy, adopt. 	<ul style="list-style-type: none"> Beginning to join up messaging and activities under the 'intelligence led' umbrella. E.g. content model video, Regional People Leaders Forum. Appropriate education/training delivered. Specialists/key users providing support to users. Principles, policies, procedures etc. are in place. Early life support processes and systems in place and operating. Leaders and their people are ready, willing and able. 	<ul style="list-style-type: none"> User uptake is increasing User feedback is being captured and acted on Issues continue to be managed and resolved in BAU. Specialists/key users continue to provide support to users. Our leaders are actively supporting our people to use tools and ways of working Intelligence Led a recognised and understood concept 	<ul style="list-style-type: none"> Intelligence Led projects are promoted as part of 'what we do' Our people understand which tools to use when, and how they can assist with their work. Collaboration is evident through use of tools. Information is easy to find, accurate, tailored . Efficiencies and ease of use are evident. Corporate Space is the default method for accessing information. Principles, policies, procedures etc. are being followed. 	<ul style="list-style-type: none"> Intelligence Led is 'what we do' Continuous improvement is a focus. Demonstrated engagement with information and analytics, combined with a sense of collective ownership of content. Ongoing support is resourced to enable future improvements.

Transfer of capability and responsibility to our business as we move towards maturity is planned for and managed as part of our change approach.

Each of our projects are at different stages, and as we move into the Embedding and Leverage & Optimise phases will combine to deliver an 'Intelligence Led' organisation.



Change activity for each component of Intelligence Led will focus on:

STAX/IKM/O365:

- Continuing to build IKM capability
- Building understanding of content model, ontology
- Using collaborative technologies – emphasise knowledge, creating communities, connections, conversations – to ensure people are connecting, sharing.

Governance: The Data and Information Governance strategy is being delivered by IIS – Outcomes, Information and Knowledge Management. BT is supporting this work and ensuring Intelligence Led activities are aligned with the Data and Information Governance strategy.

Analytics:

- Extending AGILE
- Prioritising use of data & analytics in our business,
- Continuing to develop analytics capabilities (technology and people)
- Continuing to support/update technology
- Integrating START analytics and DIP for users

Intelligent Information & Haukāinga:

- Supporting the development and implementation of Stage 1 guided help
- Stage 2, connect core information, adds to this initial capability the ability to locate and search information across a number of core information repositories that will help people connect and source the information they need to be successful in the roles they perform.
- Developing the story of Intelligent Information and Haukāinga (the true home).
- Stage 3, developing the ecosystem, and Stage 4 developing assisted intelligence.

Analytics – Platform and Outcomes

Change planning by project shows high-level progress, activities and outcomes at each stage. Each project has a detailed change and communications plan in place.



BT/Project		Primary Responsibility	Embedded in Business		
Analytics - Platform	<ul style="list-style-type: none"> ✓ Standing up platform and developing refined layer ingestion process. ✓ Availability of data and dashboards ✓ Building people capability in the technology. ✓ Iterative through PI process but foundational capabilities are in place. ✓ Supported by change management team and activities • START reporting and analytics (R4/5) 	<ul style="list-style-type: none"> • We are moving off Heritage systems and supporting our people to do this (H2F) ✓ Support processes and teams in place (SNOW) 	<ul style="list-style-type: none"> • Access to DIP for users outside DS&A is resolved. ✓ PI process continues as part of BAU ✓ Adoption of more capability from the platform – driven by maturity of the types of analytics and ingestion of data. • No co- existence 	<ul style="list-style-type: none"> • Adoption of more capability from the platform – driven by maturity of the types of analytics and ingestion of data. 	<ul style="list-style-type: none"> • Analytics support process optimisation - automate where possible
Analytics - Outcomes	<ul style="list-style-type: none"> ✓ Focus on outcomes, deliverables, embedding and utilisation of data. ✓ Focus on data as an asset ✓ Personalisation (investment in future) ✓ Development of analytics maturity steps 	<ul style="list-style-type: none"> ✓ PI Process utilised/continuing • Support for DIP in place with decisions on permanent operating model pending ✓ AGILE practice is expanding ✓ We are moving off Heritage systems and supporting our people to do this (H2F) ✓ Support processes and teams in place (SNOW) ✓ New ways of working are developing (networked teams). ✓ Success stories are being shared ✓ Supporting users (Carmens and Brents) 	<ul style="list-style-type: none"> • Focus is on prioritisation of business/customer need, building trust in the data. ✓ PI process continues as part of BAU • DS&A Operating model implemented • Increased products/services are being provided • Scaling up – considering how this impacts our business and how it changes the way we work. E.g. text analytics – still aimed at people who need to manage contact centre (100's). Informing decisions for others to do work. • Supporting consumers (John) ✓ Business education on use of START Analytics vs. DIP 	<ul style="list-style-type: none"> • Change activity focused is on utilising data in decision making and measuring benefits • Pipeline and prioritisation processes are operating • DS&A operating model is in place and change focus is continuing to develop capability and ways of working • Organisation recognises value of data and analytics. • Collaborative top down planning is evident in practice (strategic level based on intelligence) • Business pulls intelligence (leads and activities based on priority). 	<ul style="list-style-type: none"> • Data and analytics are a core part of our business and data is treated as an asset. • Our people trust the data, know how it is used and how they contribute to 'intelligence led decision making'. • Innovation based on analytics • Resource and change planning are based on analytics. • Public sector leading in use of data and intelligence. • Greater devolved decision making for delivery teams supported by leaders, communications, training and guided help. • Networked teams are our way of working. • Aligning workflow management with business priorities and technical processes for automation

Intelligent Information/Haukāinga

Change planning by project shows high-level progress, activities and outcomes at each stage. Each project has a detailed change and communications plan in place.



BT/Project	Primary Responsibility	Embedded in Business		
<p>Intelligent Information/ Haukāinga</p> <p>For each stage:</p> <ul style="list-style-type: none"> 6 monthly sprints to deliver desired outcomes Accessibility Development of the Intelligent Information 'Story' Leader engagement Pilot/test Specialist/key users identified Develop intranet and IRKB content architecture. Training needs assessment Impact Assessment Develop change and communications plan for Intelligent Information. <p>Stage 1 – Guided Help</p> <ul style="list-style-type: none"> Development and testing. Engagement with small groups of SME's from the contact centre as part of design process. Undertake impact assessment and change management planning. <p>Stage 2 – Connect Core Information</p> <ul style="list-style-type: none"> Transition of intranet into SharePoint Education/learning for content creators Rationalise/clean up content Creation of new Corporate Space landing page (Haukāinga) Identification of content creators/owners and impact assessment. <p>Stage 3 – Develop the ecosystem - Intranet community, search, landing page</p> <p>Stage 4 – Assisted intelligence – Smart Search</p>	<p>Stage 1 - Guided Help:</p> <ul style="list-style-type: none"> Soft launch approach Deployment Communications – targeted to impacted users General updates to People Leaders and unions. Update to unions as part of BT union away day Education/learning/training Early life support - SNOW Specialist/key user support Leader engagement People readiness <p>Stage 2 – Connect core Information</p> <ul style="list-style-type: none"> Intranet and improved search functionality. SharePoint 'Super users' Templates/consistency Expansion of repositories for users to search across Deployment Communications – targeted to impacted users General updates to People Leaders and unions. Update to unions as part of BT union away day Education/learning/training Early life support - SNOW Specialist/key user support Leader engagement People readiness <p>Stage 3 & 4 – Deployment TBC</p>	<p>For each stage:</p> <ul style="list-style-type: none"> Adoption/ behavioural change work, including supporting communications. Focus on 'early adopters' & 'early majority' users Specialist/key user support Leader engagement Post Go live assessment and Lessons learned <p>Stage 1 - Guided Help:</p> <ul style="list-style-type: none"> Expansion of content and focus on user uptake. Continuous improvement/feedback cycle. <p>Stage 2 - Connect core Information:</p> <ul style="list-style-type: none"> Introduce new ways of working across different user groups. Continuous improvement/feedback cycle. <p>Stage 3 – Develop the ecosystem</p> <p>Stage 4 – Assisted intelligence</p> <p>For each stage:</p> <ul style="list-style-type: none"> Adoption/ behavioural change work, including supporting communications. 	<p>For each stage:</p> <ul style="list-style-type: none"> Adoption/ behavioural change work, including supporting communications Focus on 'late adopters/laggards' Specialist/key user support Leader engagement Haukāinga /Corporate Space becomes part of Intelligent Information (landing page) Monitor/make sense of emerging technology (e.g. O365 suite) <p>Stage 1 – Guided Help:</p> <ul style="list-style-type: none"> Guided help is widely utilised across our business for a range of topics Continue to add to and promote guided help functionality. <p>Stage 2 - Connect core Information:</p> <ul style="list-style-type: none"> Continue to promote and embed functionality of Haukāinga and the ways of working this enables. <p>Stage 3 – Develop the ecosystem</p> <p>Stage 4 – Assisted intelligence</p>	<p>For each stage:</p> <ul style="list-style-type: none"> 'Intelligent Information Hub' is the default place for accessing information Adoption/ behavioural change work, including supporting communications Specialist/key user support continues to maximise use and benefits of the technology and ways of working. Leader engagement continues to embed leader support for ways of working. Review and evaluation and a continuous improvement cycle established. BAU ownership and sponsorship is established.

O365, Stax & Evidence Management

Change planning by project shows high-level progress, activities and outcomes at each stage. Each project has a detailed change and communications plan in place.



BT/Project		Primary Responsibility	Embedded in Business		
O365	<ul style="list-style-type: none"> Architecture for content management in O365 designed. Established O365 Design Working group in line with data in information governance approach. Consider how to use the ontology model in O365, so that same model can be pushed into other systems and enable smart technology in info hub. 	<ul style="list-style-type: none"> Focus on establishing information and records management practices. Investigating and deploying configuration changes to address issues such as data leakage, security and compliance on O365 suite. Establishing information architecture and housekeeping behind the scenes. Consider how to embed minimum meta-data. 	<ul style="list-style-type: none"> Focus on how our people save and store information- educate and inform. Design processes to enable people to make them more information aware. Reduce risk where we can through automation (e.g. ontology) Help people to create communities and connections. 	<ul style="list-style-type: none"> Current state – education and information for our people on where/how to store information and how to classify (metadata). Using collaborative technologies – emphasise knowledge, creating communities, connections, conversations – to ensure people are connecting, sharing. 	<ul style="list-style-type: none"> Leveraging information to improve operational efficiencies. Reduce level of human intervention in how we store and classify information (future state). Maintain communities and connections as part of 'how we work at IR'.
Stax	<ul style="list-style-type: none"> ✓ Implementation Complete ✓ Change management plan was developed and ready for deployment. 	<ul style="list-style-type: none"> ✓ Building Capability – OIKM team, Key Users, Change Champions ✓ Reinforce 'why' and 'how' ✓ Utilise and communicate the 'Content Model' ✓ Support for transition to Stax through ELS and key users. ✓ Next steps for technology – STAX 'as a service' and upgrades that have a user impact. ✓ Revisiting exceptions/priorities e.g. investigations. 	<ul style="list-style-type: none"> ✓ Continue with 'learning to use' and reinforcing good practice ✓ Support through IKM Team and utilise working smarter change champions ✓ Utilise 'Tips and Tricks' and Working Smarter platform ✓ Support 'good practice'/remove barriers ✓ Build comfort with 'open by default' ✓ Continued clean-up post-deployment (OCTC and CI&A) 	<ul style="list-style-type: none"> Stax is 'normal', people fully understand when and how to use it, and how it fits with other tools (content model) 'Open by Default' is normal Teams are using the content model to determine the best ways to work are managed in BAU. Examples of innovation and best practice are shared. Maturing support model with IT Service desk. 	<ul style="list-style-type: none"> Leveraging information to improve operational efficiencies. Reduce level of human intervention in how we store and classify information (future state). Maintain communities and connections as part of 'how we work at IR'.
Evidence Management	<ul style="list-style-type: none"> User involvement in design process Understand changes, impacts and training requirements for the teams that will be using the new evidence management tool. This includes changes to process and/or ways of working. Promote what to consider when managing current cases and how best to prepare for the future system 	<ul style="list-style-type: none"> Delivery of change and communications activities, including training if relevant, for impacted people and stakeholders. Focus on establishing required ways of working and support requirements. Monitoring uptake, issues and user feedback. Utilise 'change champions' and leader led communications. 	<ul style="list-style-type: none"> Focus on how people are using the new tool, adopting improved ability to handle documents, integrate with START and collaborate. Utilise 'Tips and Tricks' and Working Smarter platform Support 'good practice'/remove barriers Advise on and support the transition of active cases dependent on status to the new system 	<ul style="list-style-type: none"> Evidence management tool is 'normal', people fully understand when and how to use it, and how it fits with other systems e.g. START, Stax Maximise use of collaboration tools technologies – emphasise knowledge, creating communities, connections, conversations – to ensure people are connecting, sharing. Examples of innovation and best practice are shared. 	<ul style="list-style-type: none"> Adoption/ behavioural change work, including supporting communications Specialist/key user support continues to maximise use and benefits of the technology and ways of working. Leader engagement continues to embed leader support for ways of working. Review and evaluation and a continuous improvement cycle established. BAU ownership and sponsorship is established.

Data and Information Governance underpins an Intelligence Led organisation and is integrated into all change management activities and communications.



	BT/Project	Primary Responsibility	Embedded in Business		
Data & Information Governance (BAU)	<ul style="list-style-type: none"> Design of and support for data and information governance authority (T2, cross functional strategic group to manage data and information as strategic assets) Design the working group structure. Develop governance instruments framework (groups, documents, and tools). 	<ul style="list-style-type: none"> Establish feedback paths between the governance authority, working groups and communities of practice. Establish working groups (O365 stood up). Design Working Groups (6 months lifespan) – to develop tranches of data management capabilities - initially data quality, data supply, data and information risk and ethics. Data Governance Process development. 	<ul style="list-style-type: none"> Establish longer term working groups which will curate and maintain the environments and the DG/DM business processes. Educate our people on particular focus areas. For example: Data Supply, so our people understand our opportunities and obligations regarding our use of data; Data Quality so we understand the accuracy, completeness, timeliness, cost, and accessibility of the data we need for a given business purpose and data activity. 	<ul style="list-style-type: none"> Change activity focus is on maintaining visibility of data and information governance instruments, structure and processes. Identify next set of capabilities to run through the governance and management operating model. Our people understand how data and information governance and management operates in IR. Our people understand why we have access to the data and information we do, what we do and don't have access to, and how we manage and steward that data and information. 	<ul style="list-style-type: none"> We continue to evolve our data and information governance in response to our transforming organisation, changing environment, and changing technology. Our people are proficient in how to best work with data and information to get the most value from it to achieve our business objectives without compromising our values, and kept informed of changes. Exemplary practice in data and information governance and management is how we do things around here.





The Data and Information Governance strategy is being delivered by IIS – Outcomes, Information and Knowledge Management. BT is supporting this work and ensuring Intelligence Led activities are aligned with the Data and Information Governance strategy.

Intelligent Information project timelines mapped to the original IKM deliverables through four stage gates. Indicative projection.

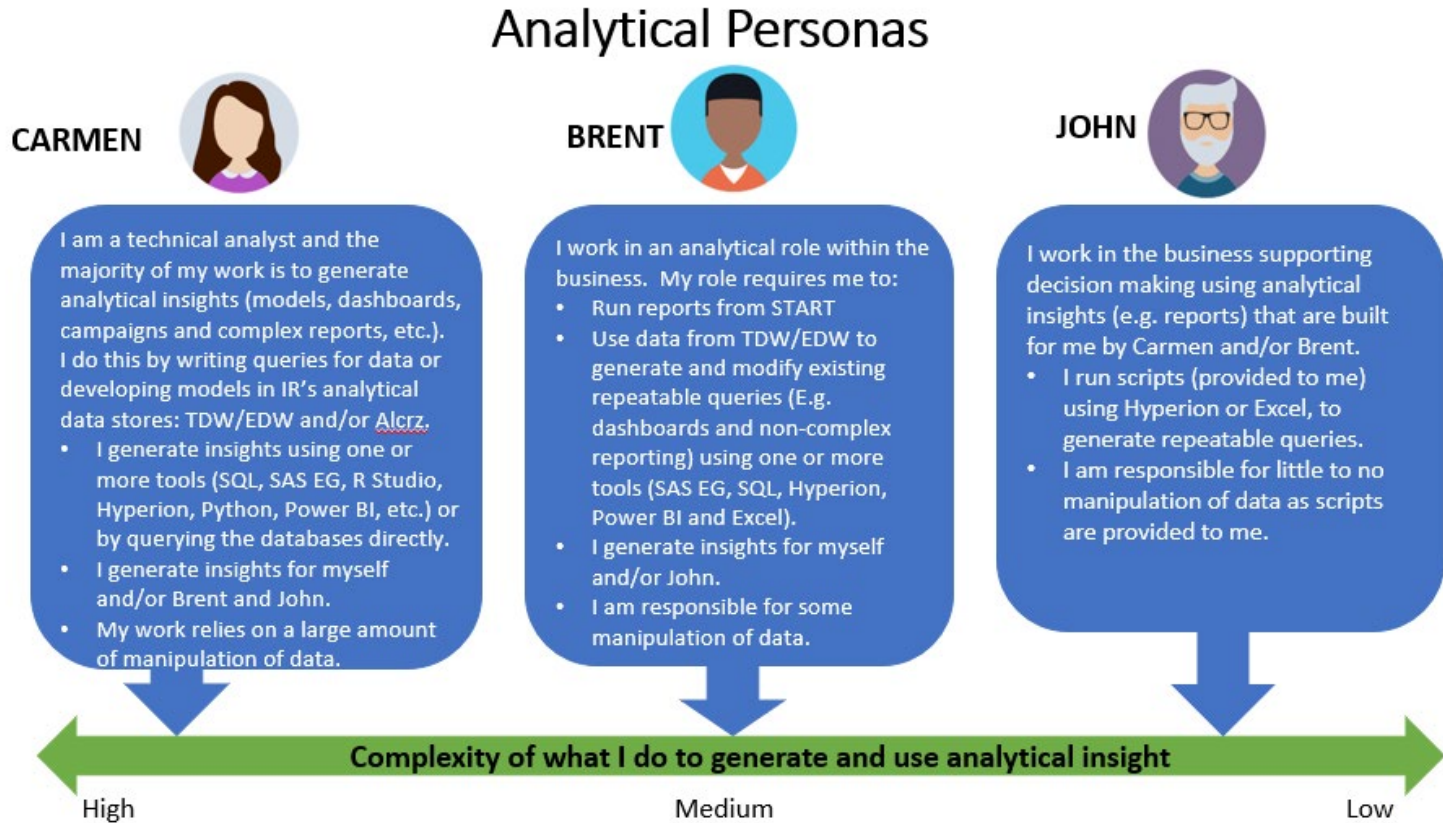
BT ends

Timeline	Oct-Dec19	Jan-Mar20	Apr-Jun20	Jul-Sep20	Oct-Dec20	Jan-Mar21	Apr-Jun21	Jul-Sep21
IKM deliverables	1 Targeted resolution		2 Connect core information		3 Develop the ecosystem		4 Develop assisted intelligence	
Knowledge base	New IRKB guided help capability provided		IRKB replaced with search and landing page		Becomes part of intelligent hub experience			
Enterprise search		Search/landing page	Organisation landing page & federated search		Enterprise search experience available		Intelligent Hub and Insights engine capability	
Integrations		Information research	Initial set of Information connectors built		Information connector set expanded			
Intranet			Intranet aligned to new organisation landing page		Becomes part of the intelligent hub experience			
Summation	Summation (Evidence management) replacement complete							

Intelligent Information stage gate high-level deliverables.

	Investment decision gate	Schedule	Deliverables
	1 Target resolution	Oct19–Mar20	<ul style="list-style-type: none"> IRKB migration (inclusive of START Help retrospectively) – Develop a guided help experience that replaces the current equivalent IRKB experience and supports START help. Leveraging existing technology investment in the website in way that it can then be optimised in the following stages. Landing page and Search – Provide an initial knowledgebase focused landing page with a search and design for the next iteration.
	2 Connect core information	Apr20– Sep20	<ul style="list-style-type: none"> Information Services – Provide connectors to other data sources to further enhance the landing page and search experience. Intranet transition – Enable the transition from the current intranet. Landing page and Search – Continue to optimise the experience and design for the next iteration.
	3 Develop the ecosystem	Oct20–Mar21	<ul style="list-style-type: none"> Information Services – Continue to provide connectors to other data sources to further enhance the landing page and search experience. Intranet transition – Finalise the transition from the intranet and create 'in context' personalised experiences based on audience, purpose and use. Landing page and Search – Continue to optimise the experience and design for the next iteration. Insights engine – Complete a RFP process and contract negotiation.
	4 Develop assisted intelligence	Apr21–Sep21	<ul style="list-style-type: none"> Insights engine – Deliver and enable the new capabilities provided. Landing page and Search – Becomes the Intelligent Information Hub when connected to the insights engine. Complete the transition of all services delivered to "business as usual".

DIP Analytical Personas



Three Analytical Personas have been created for the purpose of outlining what the Analytics and Reporting change may look like for different people in IR. These personas are evolving as we expand the use of analytics and reporting.

