Inland Revenue
Te Tari Taake

Business Transformation

Inland Revenue

Business Transformation Programme

Business Solution Blueprint – Customer Experience

Senior Responsible Owner:

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About this Document

This deliverable defines the High Level Design for the Customer Experience (CX) of the Business Transformation (BT) Programme through:

- Establishing the context for the Customer Experience business solution architecture
- Providing an overview of the end state solution for Customer Experience
- Defining the Level 3 processes which are applicable for Customer Experience business solution architecture
- Defining the Application and Information Architecture associated with the Customer Experience business solution architecture.

This deliverable will be an input into the BT Programme's Detailed Design phase for CX.

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Document Signoff

Formal Review Area	Name	Signature	Date
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The following people have supported the development of this document:			

The following people and groups have been consulted:
• Business Owner Forum (BOF) – Process Delivery
• Design Integration Forum (DIF)
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  ▪ Business Owners Team
  ▪ External Provider Relationships
  ▪ Business Priority Management
  ▪ Software Developers Liaison Unit
  ▪ Events and Support
  • Returns and Event Delivery (RED)
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○ Investigations and Advice ▪ Large Enterprise Services ○ Collections ▪ Capability Planning and Relationship Management ○ Business Planning and Integration ▪ Compliance ○ Litigation Management Unit (Solicitors) • Information, Intelligence and Communications ○ Customer Strategy ○ Analytics and Insight ▪ Insight and Intelligence Advice ▪ National Research and Evaluation Unit • Policy and Strategy ○ Strategy ▪ Better Public Services • Cross Agency Team • Performance, Facilities and Finance ○ Performance and Finance ▪ Portfolio Finance • Change and Investment Analysis • Change ○ Service Design and Implementation ▪ Business Rules Centre ▪ Change and Transformation • Technology Strategy and Operations ○ ICT Strategy and Innovation • Investigations and Advice ○ Legal and Technical Services • Corporate Integrity and Assurance ○ Risk and Assurance • Current Programmes ○ Child Support Reform ○ Better Public Services • BT Programme Workstreams ○ Policy ○ Organisational Change Management ○ Enterprise Support Services ○ Core Tax and Social Policy ○ Customer Experience and Enablement ○ Technical and Architecture ○ Data • Business Transformation Management (BTM).			

The following people and groups have been informed of the development and completion of this document: • BOF - Data • BOF - Analytics and Intelligence • BOF – IS.			

Contents

1. Executive Summary

The Business Solution Blueprint will define the highest order articulation of what the Business Transformation (BT) Programme delivers. It is a business-led high level view of the Programme that spans change enablement, customer experience, policy, business process, application and technology.

This Executive Summary will discuss the fundamental characteristics of the Customer Experience (CX) business solution architecture that Inland Revenue (IR) will need to realise the vision for transformation, providing a succinct summary of the future state. This section will also include an overview of the impact this future state will have on IR's customers, business partners, intermediaries and staff.

Finally, this Executive Summary shows how to navigate the comprehensive Blueprint to find additional detail in areas of specific interest.

1.1 Foundation of the Future State

The future state Customer Experience business solution architecture will deliver the changes necessary to transform IR into an organisation that "moves customers to cost-effective channels while creating an environment to make it easy for customers to self-manage[1]". At a high level, the changes from current state to future will be realised through five design architecture characteristics, outlined below[2].

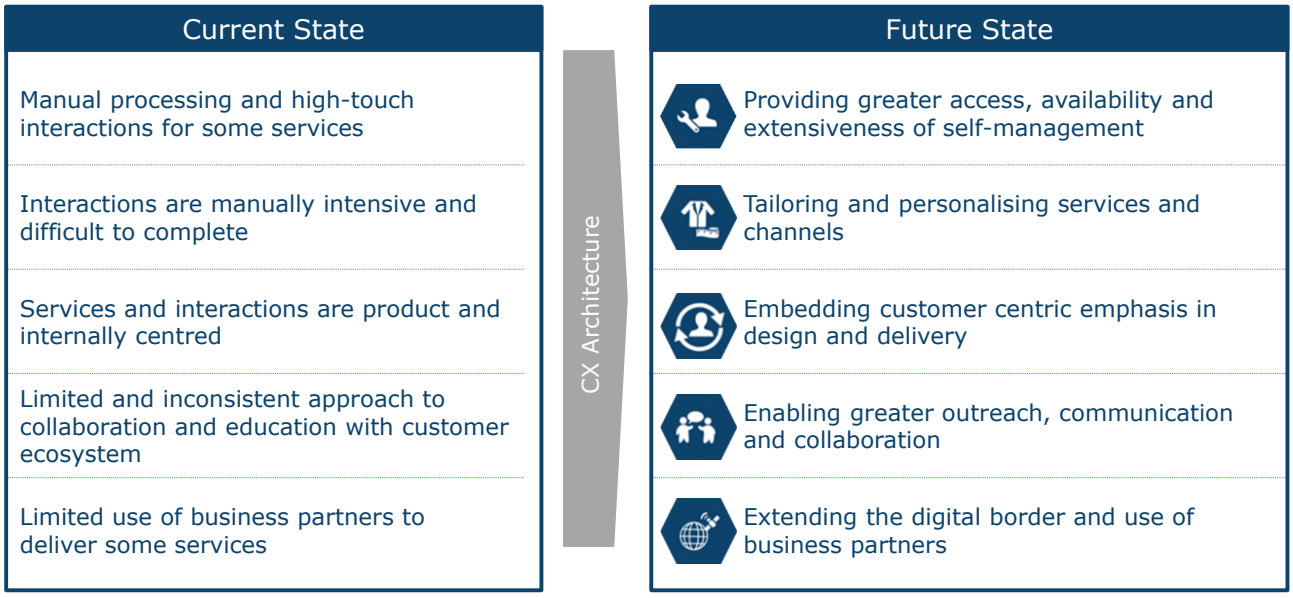


Figure 1. Future State Characteristics of the Customer Experience Architecture

Further detail on each of these future state characteristics of the CX changes will be outlined in the following sub-sections.

NOTE: The characteristics represented and explained within this document summarise key themes and concepts that exist throughout the underlying design. They exist as a

[1] Transformation Mobilisation Programme, Transformation Briefing Pack Level 3.
[2] Outreach is defined as proactive customer engagement to increase awareness and educate customers to facilitate compliance.

summarisation and communication tool and are neither inclusive of all design content nor traceable to underlying design inputs.

1.1.1 Providing Greater Access, Availability and extensiveness Self-management option

How does the architecture support this?

The CX architecture will provide greater availability and access of self-management options to customers across channels. This will be supported by greater automation of contact across all interactions and enabled through the improvement of existing channels and the introduction of new and emerging channels. The future state architecture characteristics will include the following elements.

- **Automating customer interactions.** The CX architecture will deliver market-leading tools such as virtual digital assistant, click-to-chat voice and Interactive Voice Response (IVR) to increase the availability and pervasiveness of automated and digital contact.
- **Providing validation of information at source.** The CX architecture will enable validation at the time the customer provides information rather than after submission, helping them resolve errors before it is received by processing systems.
- **Making greater use of emerging digital channels.** The CX architecture will expand IR's flexible design and delivery processes from traditional channels to embrace mobile web applications, email, SMS, API, B2B and social media channels.

What is the benefit[3]?

Customers will have a wider variety of interaction channels. This will reduce their compliance burden through the convenience of anytime, anywhere access to information, submission and education – increasing their confidence of knowing what to do, how to do it and whether what they've done is right the first time, helping customers self-manage. Specific benefits are listed below.

- **Improved compliance rate, improved customer experience.** Customer compliance burden will be reduced by increasing self-management options, including submission of information and extending use of information to reduce manual entry and duplication across services. Greater self-management will reduce overall cost-to-serve.
- **Improved customer experience.** Customers will have wider variety of choice about how they interact with IR, adopting and moving between channels according to needs and preferences during interactions. Capability will be improved and effort reduced through personalisation, increased availability and access to digital channels and tools[4].
- **Improved accuracy of assessments, calculations, reduced invalid claims.** Errors and manual processing will be reduced by preventing errors at source with improved up-front validation and near real time confirmation. The use of self-managed digital services will provide customers with the confidence that what they've done is right.
- **Increase efficiency of (non-sourced) IR operations.** Where assistance is required, for the self-managed customer it will be rapidly provided through a variety of automated and interactive options. Reducing customer contact for simple activities, queries and transactions will provide improvement in cost-to-service operations.

[3] The bold bulleted benefits have been sourced from the Transformation Briefing Pack.

- **Improved customer experience.** Increased availability of secure digital services will allow customers to interact at the time of their choice and be provided with immediate feedback and validation of results, reducing the burden on customers and increasing the certainty that what they've done it right and that IR has gotten it right.

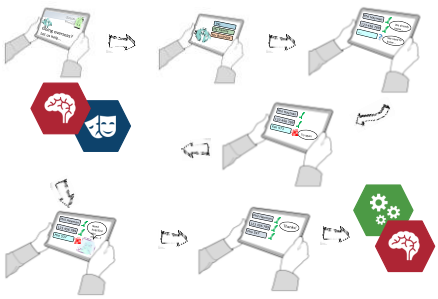
The following examples are intended to show possible applications of this CX architecture future state characteristic and should be considered for illustrative purposes only and should be read in conjunction with the detailed customer scenarios and personas which provide a full view of the Customer Experience.

Automating Customer Interaction: An Example

Customer interactions will be automated, reducing the need to contact IR staff in order to find information or answers. For example, when Phil, a student loan borrower is preparing to permanently leave the country, he is contacted when IR receives information from the Department of Internal Affairs that his visa has been approved. Phil doesn't have to do anything further he has some questions on his student loan obligations when he becomes an overseas borrower. He will be able to use virtual digital assistance to guide him to relevant information and answers.

Instead of Phil calling IR during operating hours, or emailing IR through secure email and having to wait for a reply, the virtual digital assistant will be able to use his details, information, segmentation and sentiment to tailor and highly personalise the interaction at any time through an internet enabled device. This will increase the availability of help and support, through digital channels. Using a set of prompts and dialogue, Phil will be guided to find the right information and answers to complete his interaction.

If Phil has further questions or is unable to find the right answer, he will be automatically referred to an IR staff member through the click-to-chat functionality at the most natural and appropriate point during his interaction. Using sentiment analysis and any additional information Phil provided during his interaction with the virtual digital assistant will assist the IR staff member to provide a deeper level of personalisation. Based on this, Phil will be able to talk to someone without the need to repeat information to have his questions answered quickly.



Validating at Source: An Example

In the future, information will be validated in near real time, providing assurance that customers are entering the correct information the first time and reducing uncertainty of getting their obligation calculation wrong. An example of this is where large employers have their payroll information prepopulated into payroll software based on information held within IR, allowing the organisation to accept the information or update it with latest details. Where appropriate, significant enterprises may also be prompted to correct information that doesn't appear to be correct prior to submission, allowing processing and calculations to be done with the most complete and correct information. This will increase accuracy and certainty that information is correct at a point in time for employer, employees and IR.

Adapting to New Digital Channels: An Example

As customers become more mobile and connected, IR will be able to adapt to easily design and implement channels and tools that have high usage or that customers are most familiar with. As customers become more akin to using social media channels to interact with family, friends, businesses and government[4], IR will be able to extend its social media reach to listen, communicate, engage and respond to customers[5].

For example, IR knows that a high number of student loan borrowers are based in London. Using trend analysis, IR will know that Google+ is used more than Facebook by student loan borrowers to connect to friends. Based on this, IR is able to expand and adapt its social media presence to inform the students of

[4] 2014 BDO Social Media Survey - How social media is bridging the gap between #localgov and citizens.
[5] KDD207 Social Media Interaction Model.

impending policy changes for overseas student loan borrowers and reply to questions about their situation. When a student has a question about this, they may choose to engage with IR through the social media channel of their choice and based on IR's response, learns that they does not need to take any action as their employers have already provided the information required.

1.1.2 Tailoring and Personalising Services and Channels

How does the architecture support this?

The CX architecture will enable services that use data-driven insights into customer preferences, circumstances and behaviour to personalise and tailor information and content to their experience and interactions. Rich insights covering behaviours, channel usage and interactions will be used to influence service design will be embedded within key decision-making points across the Omni-channel. A deep customer understanding will enable IR to personalise content and services and build trust with customers. The future state architecture characteristics will include the following elements.

- **Monitoring interactions across the Omni-Channel experience.** The CX architecture may monitor and record information across digital and non-digital interactions and channels and from external digital sources such as social media. From this deeper insights into customer needs will be extracted to guide decision-making.
- **Personalising content based on segmentation of customers.** The CX architecture will use data-driven insights to tailor and customise content and information provided to customers across the Omni-Channel experience.
- **Managing campaigns and marketing.** The CX architecture will use data-driven insights to focus education and marketing to influence customer behaviours through the personalisation of content to ensure it is relevant to customers at the right time.
- **Delivering digital content management.** The CX architecture will deliver greater use and volume of relevant digital content, including video, images and text to enable greater agility of communications to inform customers.
- **Designing for events.** The CX architecture will enable a deeper understanding of customer life events to proactively offer the right service and information to customers, detect and interpret event triggers and reduce the need to deal with tax administration.

What is the benefit[6]?

Tailored and personalised services will improve customer experience by providing customers with information, content and service engagement that is highly relevant to their needs and circumstances. This will make it easier to comply by offering service that promotes compliance as is the natural outcome of an interaction. Specific benefits are listed below.

- **Improve compliance rate, improved customer experience.** Services and channel experiences will be differentiated based on circumstances with a tighter coupling of insight from Intelligence to deliver tailored services and interactions. Understanding customer lifecycles will allow IR to identify key events in which to engage customers, making it easier for customers to interact with and trust IR systems and processes.
- **Improve compliance rate, improved customer experience**. Greater availability of personalised information to circumstances will reduce compliance burden and provide confidence that customers have access to right information they need to comply.
- **Increase efficiency of (non-sourced) IR operations.** IR will have greater ability to modify and amend content to better inform and assist customers. Making content and information more relevant to customers' situations and needs will help foster more inclusive interactions and allow more efficient use of IR resources, including reduced cost-to-serve channels and nature of simple customer queries and complaints.

[6] The bold bulleted benefits have been sourced from the Transformation Briefing Pack.

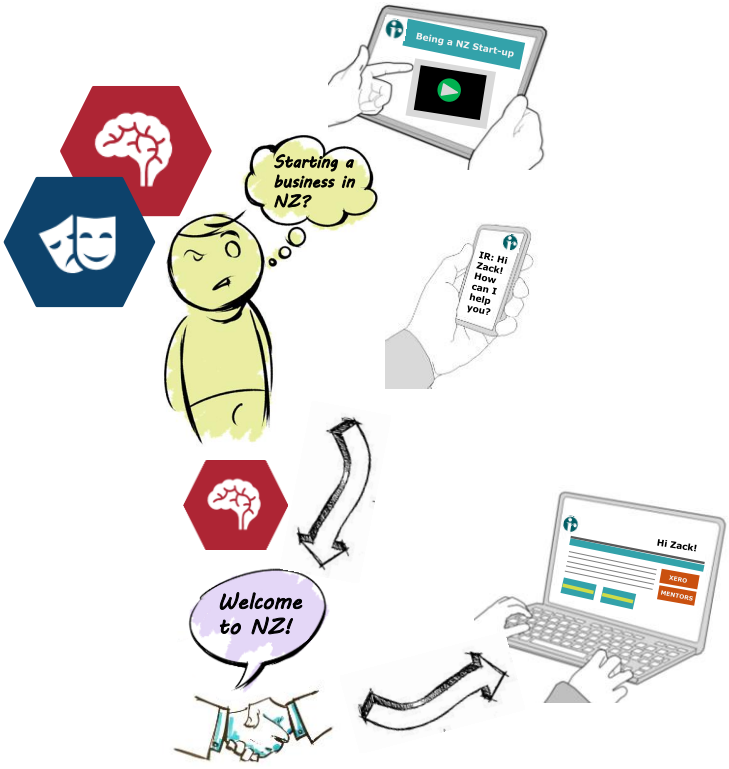
The following examples are intended to show possible applications of this CX architecture future state characteristic and should be considered for illustrative purposes only and should be read in conjunction with the detailed customer scenarios and personas which provide a full view of the Customer Experience.

Managing and Personalising Digital Content using Segmentation: An Example

In the future, customers will receive content and information that will be informed by customer profile, preference and insights gathered and generated by the Intelligence Led solution. This will enable personalisation and tailoring of services and interactions, based on behaviours rather than a one size fits all approach.

For example, Zack, an American Entrepreneur thinking about starting a business in NZ, will be able to find and receive the relevant and timely information he needs on starting a new business in New Zealand. As Zack has searched for information on the IR and other Government websites, IR knows he is looking to start a new business. Through his visa application, he falls into the "new NZ business, Start-Up, high technology use" segment.

IR will be able to use this segmentation to further personalise content and information, including providing Zack with videos, presentations and images on the next steps in the process of starting his new business, accounting software packages and how to self-manage his relationship with IR.



Monitoring Interactions across the Omni-Channel Experience: An Example

Intermediaries, such as tax agents, rely heavily on information provided by IR to facilitate tax compliance for their customers.

For example, intermediaries will be able to search for information on the best way to deal with complex business structures such as trusts and partnerships and what the subsequent obligations are. Tax agents may be able to access information services through websites via their mobile on the way to visit clients, or find information quickly on their laptop by virtual digital assistance to get their questions answered. IR will be able to monitor and record tax agents' interactions as they move from one channel and medium to another.

Managing Event Based Campaigns and Marketing: An Example

Being able to respond to changes in customer behaviour through having a wider perspective on the events that will occur in the lives of customers will enable IR to provide better whole-of-customer experiences. Where patterns of behaviour are detected, IR will be able to anticipate information needs and push information to customers with similar situations.

For example, IR knows that Twin Peaks Sports Club hold their annual general meeting in the last week of September every year. At the start of the month IR will send them information so that the club knows what they need to do to keep their nominated person information up-to-date. At the end of October IR has had no response from the club and sends them a friendly reminder.

1.1.3 Embedding Customer Centric Emphasis in Design and Delivery

How does the architecture support this?

The CX architecture will use a customer centric approach when designing and refining services and channels to develop a more informed and more relevant outcome. It will also enable a customer centric approach to delivery of services and channels, supporting a natural evolution of understanding behaviours and designing for services based on changing customer needs and circumstances. The future state architecture characteristics will include the following elements.

- **Supporting co-design and collaboration with customers.** The CX architecture will provide processes and technology that will support IR to co-design services across end-to-end processes with customers and business partners, providing more relevant services based on a better understanding of the range and diversity of customer needs.
- **Responding to customer events.** The CX architecture will be structured to respond to changes in behaviours over time, helping IR learn how to improve life event triggers and responses based on the whole-of-customer impact.
- **Listening to customers across the Omni-channel.** The CX architecture will monitor and record information across interactions and channels. Deeper insight into behaviour and motivation will be extracted to guide future service delivery improvements.
- **Continuously delivering service improvements.** The CX architecture will embed data-driven insights into its flexible delivery model, which will provide the ability for IR to rapidly adapt to changing needs in customer facing services and channels.

What is the benefit[7]?

A customer centric approach to design and delivery will enhance the overall customer experience by better meeting the needs and diversity of each Customer Group, including providing services that support customers through end-to-end lifecycles. Customer burden and non-compliance will be reduced as a result, making it easy for customers to do the right thing and difficult to make errors or commit fraud. Specific benefits are listed below.

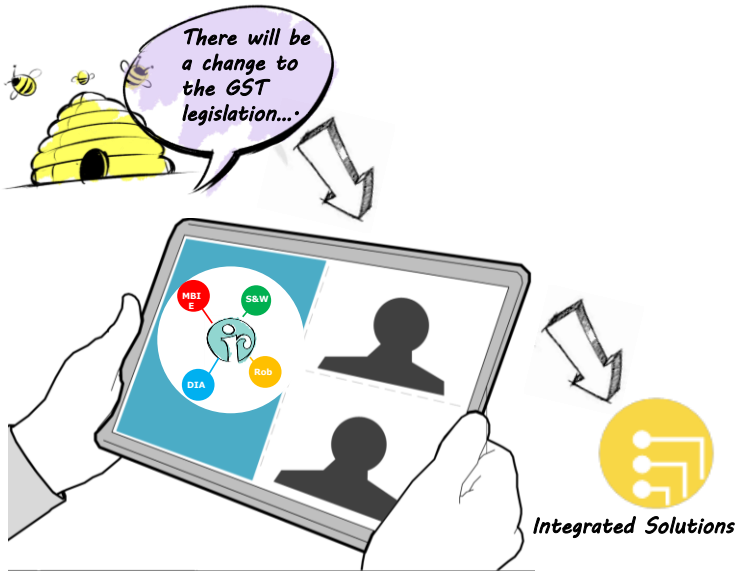
- **Improve compliance rate, improved customer experience.** Design and delivery of customer facing services and channels will evolve from the current rigid processes and systems of today to ones that are more adaptable and responsive to customer events, environment and social change. Voluntary compliance will be a natural outcome of improved experience by making it easier for customers to interact with IR. Customer experience will be enhanced through fostering an inclusive environment in which customers are actively involved in the design and delivery of services and channels.
- **Increase efficiency of (non-sourced) IR operations.** Service design change, whether identified by data-driven insights or directly through constant involvement and engagement with customers, will be realised through continuous improvement initiatives and will be met with on-going rapid innovation. Being flexible and adaptable when reacting to changes will allow more efficient use of IR resources, including reduced cost to service channels and reduced customer queries and complaints.
- **Better solution design for changes, improved perception of IR and All-Of-Government.** More agility in the delivery of customer facing services improvements will reduce the time taken to deliver new and improved services to customers and will ultimately improve the overall perception of IR and government.

[7] The bold bulleted benefits have been sourced from the Transformation Briefing Pack.

The following examples are intended to show possible applications of this CX architecture future state characteristic and should be considered for illustrative purposes only and should be read in conjunction with the detailed customer scenarios and personas which provide a full view of the Customer Experience.

Co-Design and Collaboration with the Customer: An Example

New tools and processes will mean that IR will be able to collaborate with a wide range of customers during the design process. When the legislation around GST is amended, customers and business partners will be engaged to collaborate and co-design the potential changes to systems and end-to-end processes and help determine the potential impact to IR and customers. For example, S&W Software, a trusted software developer business partner, together with IR will be able to co-create the solution and test the supporting services to ensure the desired outcome is achieved across different channels.



Detecting and Responding to Customer Events: An Example

Customers will often be unaware of events that occur in their life that may impact their personal entitlement or obligation. Alternatively individuals can be so consumed by the event that informing IR of changes is not top of mind. This may result in full entitlements not being received or obligations falling behind. For example, when Liz Daniel's husband dies, she will be able to register his death with the Department of Internal Affairs and IR will simultaneously receive this information. Based on this event being detected, IR will trigger an action to close her husband's account, reducing the compliance burden on the grieving family as well as ensuring timely action is taken. IR knows that Liz's husband usually interacted with IR and based on the event of his passing, Liz and her nominated person will be sent information and material on any future obligations that Liz may need to meet.

Listening to Customers Across the Channels: An Example

Future design approaches will be supported by the collection of customer behaviours across channels. Understanding when and why customers choose to use one channel over another, or switch between channels will enable IR to respond to customer demand and design services to better meet the needs of customers. For example, as Zack, the American Entrepreneur, searches for information on how to start a business on IR and other Government Agency websites, apps and on forums, IR will be able to track and monitor his interactions. If Zack chooses to go to a start-up business seminar once he is in NZ, IR will be able to use this to gain deeper insights into behaviours and motivations of Zack or customers like him.

Continuous Delivery of Service Improvement: An Example

Using data-driven insights and information, IR will be able to monitor when services fail, channels are not effective through drop-off rates and when customers need additional support. IR will be able to rapidly adapt to the changing needs of customers and continuously improve services and channels. For example, as customers move to using more social media channels, IR will be able to expand the Register and Enrol service to allow customers to use social media accounts to enrol into products using their social media account details and events.

1.1.4 Enabling Greater Outreach, Communication and Collaboration

How does the architecture support this?

The CX architecture will enable greater outreach (awareness and education), communication and collaboration with customers by providing the channels and tools to do so. This will be made complete with substantial, effective and intriguing content, driven by frontend user experience and technologies. Together with data sharing and exchange, this will create robust content and knowledgebase. The future state architecture characteristics will include the following elements.

- **Delivering content authoring, publishing and digital asset management.** The CX architecture will support greater use and increasing volumes of digital content, including video, images and text. Digital content management will support the agility of communications to inform customers, ensuring consistency, relevance and timeliness.
- **Designing relevant channels around devices.** The CX architecture will support the need to cater for different devices, whether via apps or responsive design, to address changing trends of customers shifting towards devices such as mobile and tablets.
- **Improving experience across all channels.** Having robust content will not be beneficial if customers find it hard to navigate, access and search for information. The CX experience will take a customer centric approach and ensure channels and platforms are designed with the customer in mind.
- **Personalising information and communication messages.** With the support of Intelligence Led insights and customer profiling, the CX architecture will focus on the provision of highly personalised and targeted information available to customers at the right time, through preferred channels, which will help increase obligation and entitlement awareness and understanding of what to do, therefore reduce burden.
- **Evaluating communication, outreach and collaboration effectiveness at the time of campaign/distribution.** The CX architecture will allow IR to proactively listen and engage with customers and leverage information generated by Intelligence Led processes to gain a deeper understanding of pain points and behaviours, ultimately informing campaigns, education and information distribution.

What is the benefit[8]?

Increases in awareness and education will reduce compliance burden as well as improve services and products. Experience is enhanced through trust that IR will provide education and campaigns at the right time, where needed. Specific benefits are listed below.

- **Improved customer experience.** Communication and collaboration tools will be standardised, streamlined and personalised to profiles, preferences and interactions. Automated delivery will allow customers to receive targeted, relevant, timely content delivered through the Omni-Channel experience reducing the amount of manual effort.
- **Better solution design for changes, improved customer experience.** IR will have the ability to measure and discover improvement initiatives through Intelligence Led capabilities to ensure that customers are constantly involved and engaged.
- **Better solution design for changes.** There will be an improved ability to create continuous improvement initiatives that will enhance customer engagement, through proactively listening to customers and business partners.

[8] The bold bulleted benefits have been sourced from the Transformation Briefing Pack.

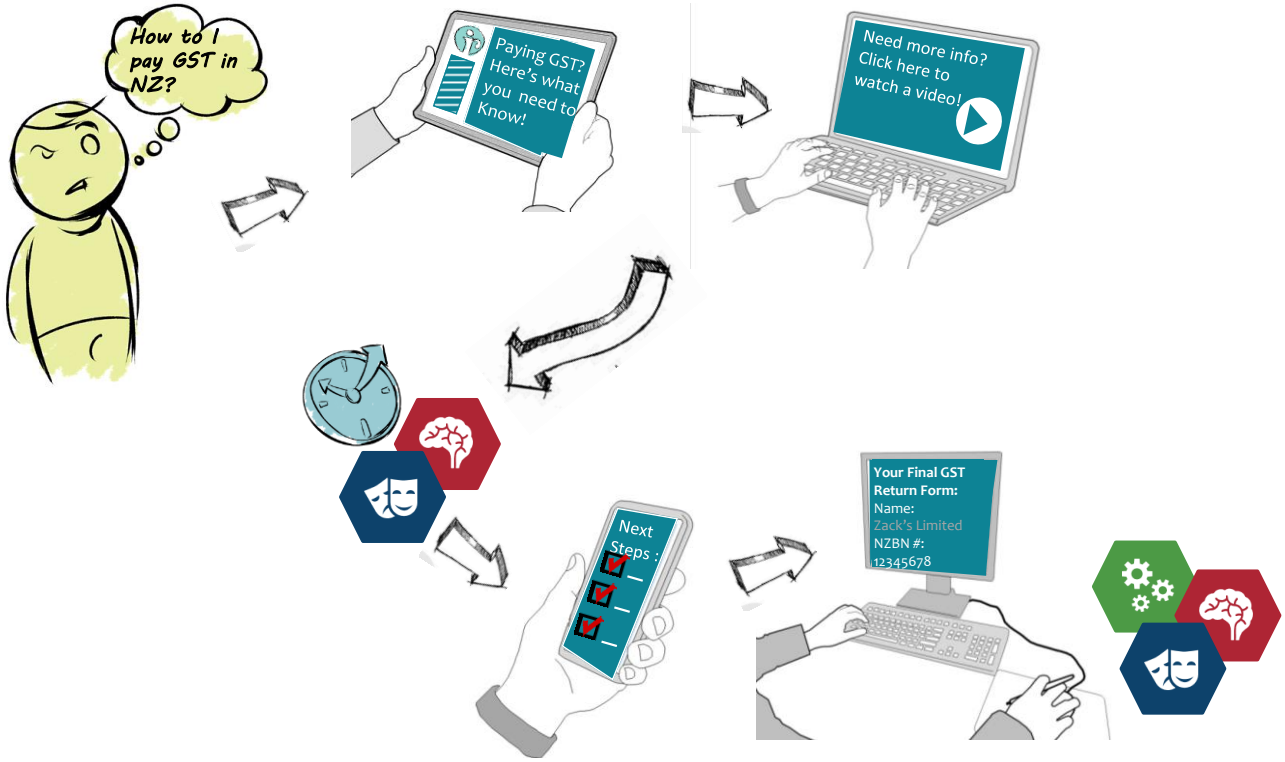
The following examples are intended to show possible applications of this CX architecture future state characteristic and should be considered for illustrative purposes only and should be read in conjunction with the detailed customer scenarios and personas which provide a full view of the Customer Experience.

Managing Personalised Information and Messages: An Example

IR will be able to present information that will be personalised by the customer to suit their individual needs. For example, Zack is new to GST and needs detailed information and educational messages, while over time as his knowledge, behaviour and confidence increases he will need less education and detail. In giving customers the ability to personalise what they need – in the format that they prefer such as text/graphic or video – information delivered is more relevant. IR will be able to manage the content and format easily through authoring, publishing and digital asset management tools, reducing the effort and time taken to personalise information and content.

Designing Around Channels and Devices: An Example

IR will design services that customers will be able to access from a range of channels and devices while still providing a positive experience. For example, when Zack makes an enquiry about GST obligations through his laptop, he will receive a different service and experience compared to making an enquiry via a mobile app. On his laptop Zack may have access to a virtual digital assistant in which his enquiry will be received and resolved. Using his mobile app, Zack may be able to submit an enquiry on the go and receive the resolution once he is back at the office.



1.1.5 Extending the Digital Border and Use of Business Partners

How does the architecture support this?

The CX architecture will enable IR to extend its digital border[9] and make greater use of business partners to provide richer data and information on customers, trends and life events as well as services on behalf or jointly with IR, where they are better placed to do so[10]. This will enable IR to provide a consistent set of core customer services, delivered through end-to-end processes where required. The future state architecture characteristics will include the following elements.

- **Enabling greater use of business partners.** The CX architecture will support the use of business partners to provide information, services, channels, or products on behalf of or jointly with IR through the integration of internal systems and end-to-end or partial processes with external providers.
- **Supporting the management of business partners.** The CX architecture will provide processes to enable and support stronger management through business partner management tools, people and end-to-end processes.
- **Opening up data and services to business partners, intermediaries and customers.** The CX architecture will enable data and information to be open and available for customers, business partners and intermediaries to access and use to enable crowdsourcing and analytics.
- **Improving the ability for IR to facilitate innovation with external parties.** The CX architecture will increase the ability for IR, business partners, intermediaries and customers coming together to collaborate, design and produce ideas, services and products through digital collaboration and co-design tools and processes.
- **Implementing the ability for IR to receive information through digital and emerging channels.** The CX architecture will provide the ability for information to be submitted and provided through digital and emerging channels, which will decrease the burden for customers to provide information and increase the amount IR will receive.

What is the benefit[11]?

Leveraging the capability and expertise of business partners will improve the Customer Experience. Specific benefits are listed below.

- **Improved customer experience.** IR will enhance its service offering to take advantage of the capabilities and expertise of business partners. Services with business partners will be more integrated, creating a consistent and seamless experience regardless of who facilitates the interaction with customers.
- **Improved perception of IR and All-Of-Government.** Information, channels, services and products will be created and/or managed on behalf of or jointly with IR.
- **Reduce invalid claims.** Information and data provided through the extension of IR's digital border will provide richer data for IR to utilise and generate intelligence for customer and risk profiling.

[9] Extending the Digital Border is defined as the extension of IRs digital boundary to include digital services delivered indirectly by business partners (eg, software developers and other government agencies collecting information on behalf of Inland Revenue).
[10] Transformation Mobilisation Programme, Transformation Briefing Pack Level 3.
[11] The bold bulleted benefits have been sourced from the Transformation Briefing Pack.

- **Increased influence on social policy development.** IR will be more adaptable to policy, social and environmental changes by leveraging the strengths, capabilities and expertise of business partners and intermediaries.

The following examples are intended to show possible applications of this CX architecture future state characteristic and should be considered for illustrative purposes only and should be read in conjunction with the detailed customer scenarios and personas which provide a full view of the Customer Experience.

Providing Services through Business Partners: An Example

IR will be able to extend its Digital Border and leverage the expertise and knowledge of business partners such as government agencies to design and offer services jointly with IR.

For example, IR, customers and business partners, will be able to co-design and create a service that will make it easier for businesses to manage GST or VAT on goods or services purchased overseas. Here IR, eBay, PayPal, MBIE and OECD agencies will work together to offer services to automatically collect GST or VAT from goods purchased overseas. IR will be able to leverage seller provided information from eBay as well as data held by other agencies, such as the NZBN and payment information from PayPal to collect the correct GST or VAT amount directly at the point of sale, regardless of the country of the seller.

Managing Business Partners: An Example

Customers, business partners and IR will have access to a community through secure digital collaboration tools and platforms. When a new tax type is announced by Parliament and changes need to be made quickly, IR will be able to identify and engage trusted Software Developers to work collaboratively on the changes required.

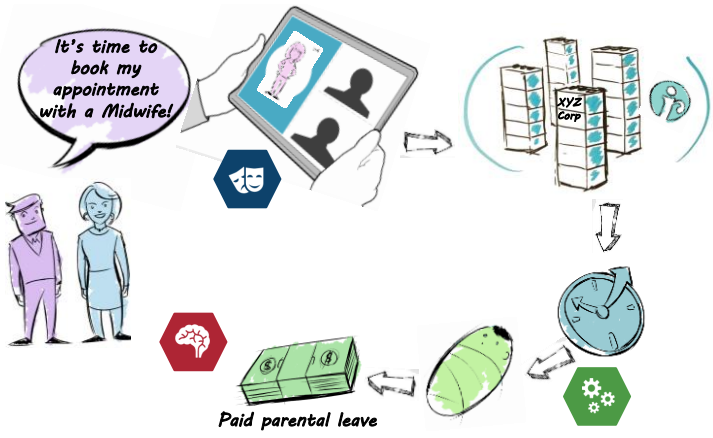
Data and services will be open and Software Developers will have access to the information, data and context needed to work on legislation changes with IR and other government agencies. Due to the flexible and secure digital platform, discussions can be had with trusted partners about the benefits of implementing any new innovations that transpire in the collaboration tool.

Once legislation changes are approved, updates to both IR and Software Developer systems will be managed through agile development and implementation. Customers will be able to see the benefits immediately after implementation, increasing trust in the Government.

Innovating with External Parties: An Example

IR will be able to innovate with external parties such as government agencies and employers to collaborate and innovate on services.

For example, IR, midwives and employers will be able to design and create a service that jointly will have greater benefits for IR and customers. When a midwife registers a new patient, they will be able to enrol them into paid parental leave, with the correct and most accurate information validated by the customer at that point in time. IR will be able to leverage customer provided information as well as data held by the employer, such as the date of parental leave to trigger a calculation for the correct paid parental leave amount, prepopulate forms, information and notifications to provide personalised correspondence to the mother whilst she is with the midwife.



1.1.6 Overview of the Impact on IR's Customers, Business Partners and Staff

Shifting from the current state to the future state will have impacts on IR's customers, business partners, intermediaries and IR staff. An early view and summary of impacts from the Customer Experience Business Process Architecture include the following.

Customers, Business Partners and Intermediaries

- The changes and timing will drive different impacts for Customer Groups and will also vary depending on their channel choice. Some customers will require a capability uplift to gain new skills, shift mind-sets to digital and use new processes and systems. There may be an initial compliance cost to adopt and use new digital tools. With increasing sophistication of accounting software intermediary business models will likely need to evolve – spending less time on tax return preparation and potentially more time on advisory services.
- Digital customers will have the ability to self-manage in near real time and this, combined with IR's use of Business Partner information/intelligence (for example, government agencies/banks) means IR will be able to provide a tailored service that takes into account customer lifecycles, behaviours and needs. This will reduce the need for individuals to contact IR direct and will assist in ensuring compliance and getting their correct entitlements from the start.
- Customers will still have a choice of channels. There is likely to be a need for incentives or clear benefits to be shown to move some customers – their experiences and channel choice will change over time particularly if they adopt a digital model. In addition, good business systems and processes supported by digital and near real time improvements will help businesses run more efficiently.
- Collaboration with business partners (eg, software developers) and intermediaries will enhance customer communication and education choices.
- Government agencies, in addition to making payroll changes for their employees, may also need to make core system and process changes relating to deductions for their customers.

IR Staff

- Significant increase in automation, customer self-management and education will result in a reduction in manual work, validation, errors and customer contacts.
- The proportion of complex customer issues will increase requiring a capability shift, embedding of customer and compliance analysis across IR and the use of new tools and technologies.
- Channel shift to digital service delivery with a wider service window enabled by virtual assistance and more digital customer contacts. This will have implications in terms of IR's "working window"[12].
- Micro-segmentation of customers will enable a more practical and specific service from IR, with services tailored to customer needs: our people will need to utilise the information available and adapt their approach to the customer's circumstances quickly regardless of channel.
- Near real time environment will require a shift in the way of working, to provide faster manual response times to manage complex queries.

[12] As per KDD206 - Future State Customer Services Levels and KDD204 - Future State Customer Service, further refinements and decisions on service availability and channels will be made at the Detailed Design stage.

- Increased co-design with our customers and increased use of business partners to deliver services will require a different skillset and mind-set in the development of services and customer interactions.

Further information on impacts is documented within the Business Processes in Section 4 of this document and a consolidated view can be found in Appendix F. A comprehensive organisational impact assessment (IR staff and customers) deliverable will be completed in October 2015 by the Organisational Change Management team, following the Commercial off the Shelf (COTS) vendor decision and finalisation of *Programme Delivery Plan for Stages 1 to 4*.

This document contains seven key sections. The following diagram provides an outline of how to navigate the Customer Experience Blueprint and find additional detail in areas of specific interest.

Areas of Interest	Where to find the detailed content
What will the future state experience be for customers. Defined through understanding: • *Who who are IR's customers* • *What are the key shifts in the experience* • *What do these shifts mean for IR.*	**Customer Experience Definition** **Section 3.1**
What are the required changes to IR's channels to enable the future state Customer Experience. Which customer facing services will be prioritised for investment to enable the future state experience.	**Supporting Channels and Customer Facing Services** **Section 3.2**
What are the Customer Experience Future State Architectural Characteristics that will help enable IR to realise the BT transformation goals.	**Realising Transformation Goals** **Section 3.3**
What impacts will the future state customer experience, services and nature of interactions have on the changes to IR's channel usage volumes.	**Performance and Volume Requirements** **Section 3.4**
What are Business Processes from the Target Operating Model that will be required to support the future state Customer Experience architecture, covering: • *Future Characteristics* • *Architectural shifts* • *Enabling Solutions* • *Pain Points* • *Value Drivers.*	**Business Process Architecture** **Section 4.1**
What data will the future state Customer Experience Business Processes utilise, illustrated through the new Conceptual Data Model framework.	**Conceptual Data Model Inputs and Outputs** **Section 4.3**
What application and solutions will support the future state Customer Experience architecture, illustrated by a mapping between the Application Component Reference Model and the future state Business Processes.	**Mapping to the Application Component Reference Model** **Section 4.4**

Figure 2. Executive Summary Reading Guide