

**From:** [Tayla Pickering](#)  
**To:** [Tayla Pickering](#)  
**Subject:** Business Case & Memo  
**Date:** Tuesday, 25 June 2024 9:15:26 am  
**Attachments:** [image001.png](#)  
[Memo for Change - Customer Operations Banding Review \(3\).pdf](#)  
[Business Case for Change - Te Mahau Support Model - Signed \(1\).pdf](#)

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**From:** Christina Laubscher <[Christina.Laubscher@nzta.govt.nz](mailto:Christina.Laubscher@nzta.govt.nz)> **On Behalf Of** Tracy Moore  
**Sent:** Tuesday, April 23, 2024 10:09 AM  
**To:** Eva Glastonbury <[Eva.Glastonbury@nzta.govt.nz](mailto:Eva.Glastonbury@nzta.govt.nz)>; Tayla Pickering <[Tayla.Pickering@nzta.govt.nz](mailto:Tayla.Pickering@nzta.govt.nz)>  
**Subject:** Re: Business Case & Memo

Morning Tayla,

Please find attached. Signed by Tracy.

Ngā mihi nui

## Christina Laubscher

**PA to Tracy Duthie, Head of Customer Business Performance, Customer and Services**

**PA to Tracy Moore, Head of Customer Operations, Customer and Services**

Corporate Support

Email: [Christina.Laubscher@nzta.govt.nz](mailto:Christina.Laubscher@nzta.govt.nz)  
Phone: s 9(2)(a)  
Mobile

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**From:** Eva Glastonbury <[Eva.Glastonbury@nzta.govt.nz](mailto:Eva.Glastonbury@nzta.govt.nz)>  
**Sent:** Tuesday, 23 April 2024 9:59 AM  
**To:** Tayla Pickering <[Tayla.Pickering@nzta.govt.nz](mailto:Tayla.Pickering@nzta.govt.nz)>  
**Cc:** Tracy Moore <[Tracy.Moore@nzta.govt.nz](mailto:Tracy.Moore@nzta.govt.nz)>  
**Subject:** RE: Business Case & Memo

Attached and signed.

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**From:** Tayla Pickering <[Tayla.Pickering@nzta.govt.nz](mailto:Tayla.Pickering@nzta.govt.nz)>  
**Sent:** Monday, April 22, 2024 4:33 PM  
**To:** Eva Glastonbury <[Eva.Glastonbury@nzta.govt.nz](mailto:Eva.Glastonbury@nzta.govt.nz)>  
**Cc:** Sarina Pratley <[Sarina.Pratley@nzta.govt.nz](mailto:Sarina.Pratley@nzta.govt.nz)>; Tracy Moore <[Tracy.Moore@nzta.govt.nz](mailto:Tracy.Moore@nzta.govt.nz)>

**Subject:** Business Case & Memo

Kia ora Eva,

Hope you are having a great week.

I met with Sarina last week in relation to the two attachments. Sarina was comfortable to sign both following some minor revisions to the business case and memo, which have now been made.

Please can you add Sarina's signature to each of the documents please and share with Christina (CC myself) so that Tracy's signature can also be added?

Thanks so much!

**Tayla Pickering** (she/her)

**HR Business Partner, Business Partnering Team**

Pūmanawa Tāngata | People and Safety Group

Email: [tayla.pickering@nzta.govt.nz](mailto:tayla.pickering@nzta.govt.nz)

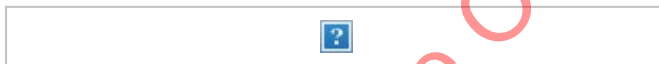
Phone: s 9(2)(a)

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# Memo for Change – Customer Operations Banding Review

DATE	18/04/2024
TO	Sarina Pratley, Chief Customer and Services Officer
FROM	Tracy Moore, Head of Customer Operations Tayla Pickering, HR Business Partner
SUBJECT	<b>Business Case for Change – Approval to Proceed</b>
APPROVE	Sarina Pratley, Chief Customer and Services
NOTE	This approval process has been endorsed by Head of Business Partnering

## PURPOSE

This memo seeks your approval to:

- Proceed with consultation on the proposed change for the Customer Operations Banding Review.
- Proceed with financial implications acknowledging a requirement to offset cost increases by reducing spending elsewhere within Te Mahau.

## CONTEXT

In 2022 Waka Kotahi committed to conducting a banding review for all positions band 14 and below within our Regulatory and Customer Services | Te Mahau Groups.

Waka Kotahi recognised:

- It had been several years since we updated the position descriptions for many of our Band 11-14 roles.
- Our Agency has changed significantly and roles and responsibilities for many positions have evolved.
- It is important that we have an accurate view of job sizing for our roles to help ensure we are paying competitively and attracting new talent.

The review was split into phases with Regulatory conducting a review in 2022. Te Mahau led Phase 1 of the review for certain roles in August 2023 with a commitment to start phase 2 shortly thereafter. Before progressing the review, we had to gain deeper insights into our operational practices and have the relevant information to proceed with confidence.

Through this process, we have identified specific areas for improvement aimed at enhancing both our customer and employee experiences. As a result, we recognise the necessity of differentiating processes based on their impact to employees moving forward.

This proposal aims to address the banding review process for roles not affected by the Customer Support Model Review. This is the final review process and will conclude the banding review for all positions band 14 and below.

## THE REVIEW

The review identified:

- No material changes to any of the affected positions.
- There is an opportunity to realign titles to better reflect the roles and responsibilities.
- Case Officer positions are banded differently in various parts of the organisation despite doing the same or similar types of work.

All positions were reviewed by NZTA's Job Evaluation Committee, the outcomes (subject to consultation) are provided below:

- There are no positions that have been evaluated as needing to decrease in terms of their banding.
- We are proposing an uplift in job band for the Case Officers in the Customer Service Support Team to ensure consistency with market standards for similar roles.
- We are proposing no further banding changes, evaluation of the remaining proposed position descriptions has confirmed compensation aligns with market benchmarks for similar roles.
- Where there are individual impacts on remuneration – we propose to include an increase to maintain PIR (position in range), backdated to align with Phase 1 of the Te Mahau banding review.
- We propose changing the job title for Technical Leads in Customer Operations to distinguish their specialty from those in the Contact Centre.
- There is no proposed disestablishment of any positions.

## FINANCIAL IMPACT

The estimate cost implications of the banding review

The monetary impact has been consulted with Te Mahau Senior Business Accountant Florian of whom is supportive of the changes providing cost increases are offset by a reduction in spending elsewhere within Te Mahau.

### Approximate Costs

The proposal for Te Mahau Band Review seeks to ensure all Case Officers within Customer Operations are on the same band. The implication of this proposal would see three employees increase from band 12 to band 13.

As agreed, PIR (Position in Range) will be maintained, and remuneration increases will be backdated to 1 July 2023 in line with previous banding review outcome principles.

The '24/25 Additional Cost' has included an indicative 3% increase to accommodate for this year's remuneration review.

Position	Current Base Salary	PIR to Maintain	Proposed Base Salary	23/24 Additional Cost	24/25 Additional Cost
Case Officer	s 9(2)(a)	s 9(2)(a)	s 9(2)(a)	s 9(2)(a)	s 9(2)(a)
Case Officer	s 9(2)(a)	s 9(2)(a)	s 9(2)(a)	s 9(2)(a)	s 9(2)(a)
Case Officer	s 9(2)(a)	s 9(2)(a)	s 9(2)(a)	s 9(2)(a)	s 9(2)(a)
<b>Total (Plus 3% KiwiSaver)</b>				<b>\$18,992.07</b>	<b>\$25,279.14</b>

## INDICATIVE TIMEFRAME

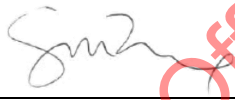
The consultation period is proposed to run from 7 May 2024 to 17 May 2024 and we would anticipate bringing a final decision to you for approval by 27 May 2024. We anticipate changes to be implemented by 3 June 2024.

**Submitted by:**

  
Head of Customer Operations

Date: 23.04.2024

**Approved by:**

  
Chief Customer and Services Officer

Date: 23.04.24

# Business Case for Change – Te Mahau Support Model

DATE	18/04/2024
TO	Sarina Pratley, Chief Customer and Services Officer
FROM	Tracy Moore, Head of Customer Operations Tayla Pickering, HR Business Partner
SUBJECT	<b>Business Case for Change – Approval to Proceed</b>
APPROVE	Sarina Pratley, Chief Customer and Services
NOTE	This approval process has been endorsed by Head of Business Partnering

## PURPOSE

To seek your approval to:

- Proceed with consultation on the proposed structure change to enhance our Customer Support Model.
- Proceed with financial implications acknowledging a requirement to offset cost increases by reducing spending elsewhere within Te Mahau.

The DRAFT consultation document, containing additional details is attached for your reference.

## BACKGROUND AND RATIONALE

After engaging with employees to gain deeper insights into our operational practices, we identified specific areas for improvement to elevate our customer and employee experience.

These areas are:

- The transition process from training to team integration requires a review to enhance support and alleviate pressure on the assistance lines.
- There is a lack of role clarity and responsibility causing confusion in tasks, responsibilities, and distinctions between roles.
- Our support model lacks ownership, structure and appropriate coverage with inefficient systems and processes, which impact our team and customer experience, impeding our ability to meet our goals.
- The current support framework imposes operational pressure, diverting focus from development and identification of continuous improvement initiatives.
- Our inefficient support model results in longer call times and service delays for the customer, the way in which we do things does not place the customer at the heart of what we do.

This has created a need to revise our Customer Support Model to ensure our operation is effective and efficient and meets the needs of both our customer and employees.

## OBJECTIVES OF CHANGE

- Establish ownership and oversight of technical coaching to drive continuous improvement and elevate knowledge transfer, training, and support.
- Define clear accountabilities across roles, teams, and functions to ensure role clarity and cohesive understanding of interdependencies.

- Optimise our support model with real-time, single-point escalation pathways for each product, supported by a structure tailored to our needs.
- Reduce operational pressures and enhance focus on development and continuous improvement.
- Improve employee and customer experience, call quality and reduce wait times and service delays.

## LINK TO NZTA STRATEGY

NZTA and the Government of the day have emphasised the importance of serving our customers and improving their experience. Further, delivery excellence and the pursuit of opportunities for more effective and efficient operations are central to our organisation's goals. This proposal directly aligns to Te Kāpehu and expectations set by Government, focusing on enhancing both employee and customer experiences while achieving greater effectiveness and efficiency. Ultimately, this approach aims to achieve cost neutrality in the longer term with the potential for further reductions.

## OVERVIEW OF INTENDED CHANGES

The proposed changes seek to:

- Differentiate and separate back-office functions from front-line, real-time support needs.
- Streamline a new real-time support function.
- Optimise the customer support model to improve efficiency, and customer and employee experience.
- Consolidate the four current assistance lines into two dedicated 'helpdesk' lines for each product.

We propose to do this by:

- Establishing a Capability Team with ownership and oversight of technical coaching and accountability for driving continuous improvement and elevating knowledge transfer, training, and support across the Contact Centre.
  - Reducing the number of Team Leader, Customer Services positions from 13.5 FTE to 11.5 FTE with minor revisions to the position description including a title change to Team Leader, Contact Centre.
  - Establishing one full-time Team Manager, Contact Centre Capability position to oversee all Technical Coaches and manage onboarding and technical coaching, support, and continuous improvement. This position will be created by repurposing a funded Team leader, Customer Services position.
  - Reconfirming Technical Leads into Technical Coaches with reporting line changes to the Team Manager, Contact Centre Capability.
  - Establishing one additional Technical Coach position. This position will be created by repurposing a funded, vacant Team leader, Customer Services position.
- Disestablishing four Product Specialist positions, with the proposal to divide the two workflows into real-time and back office.
  - Establishing two new Operations Support Specialist positions to focus on back-office functions, remaining in Customer Operations.
  - Establishing two new Technical Coach positions within the Customer Contact Centre, in the new Capability Team to focus on real time support.

All proposed changes will undergo employee consultation with affected employees within the designated scope.

## **BENEFITS**

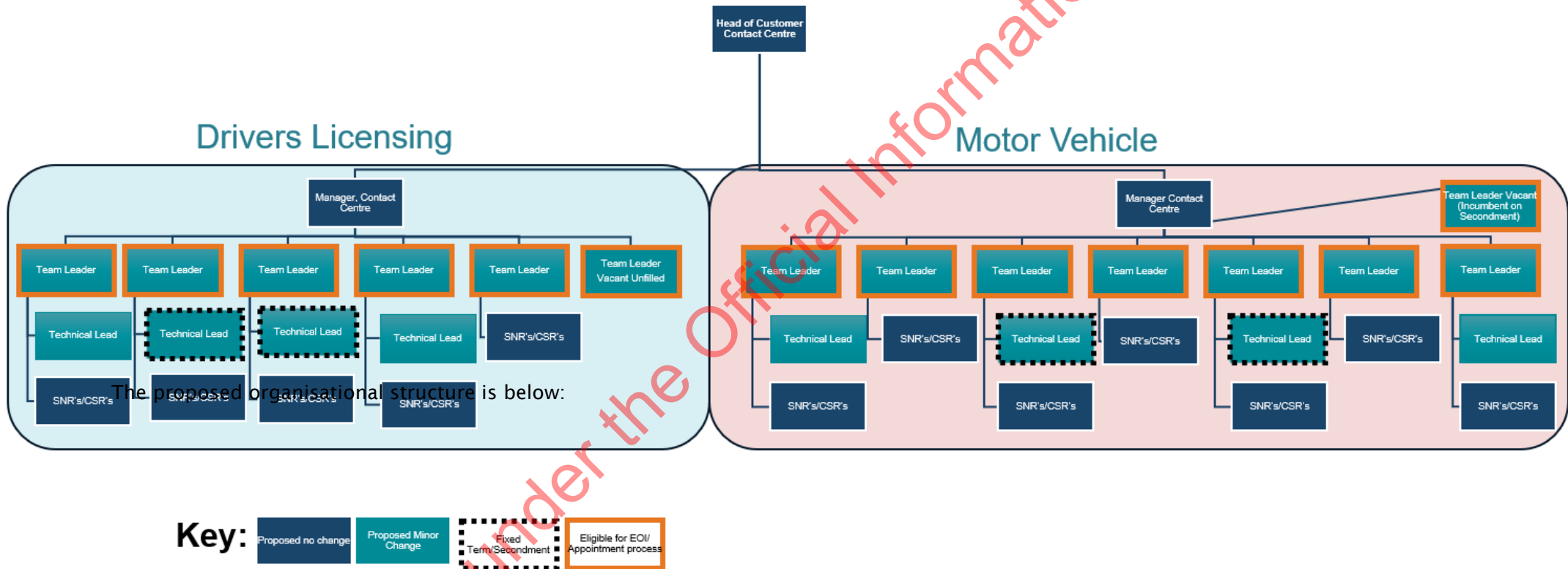
- Elevate the quality of support which will alleviate pressure on the assistance lines and lead to more efficient and effective employee and customer experience.
- Have defined roles and responsibilities which will reduce confusion and increase task efficiency leading to smoother operations and improved performance.
- Improved support model offering consistent assistance, enhanced ownership of onboarding and technical coaching with a stronger focus on growing the capability of our people.
- Enhancement of the workflow for assistance lines will reduce call transfers and repeat calls. Ownership within in one team will make it easier to identify training gaps and for continuous improvement.
- Improved customer experience, call quality and reduced timeframes and service delays.
- Implementing a first call resolution strategy for the assistance line will decrease line transfers and wait times, leading to reduced telecommunications costs, while enhanced training and knowledge transfer initiatives aim to empower staff to handle calls independently, further lowering telecommunication expenses.



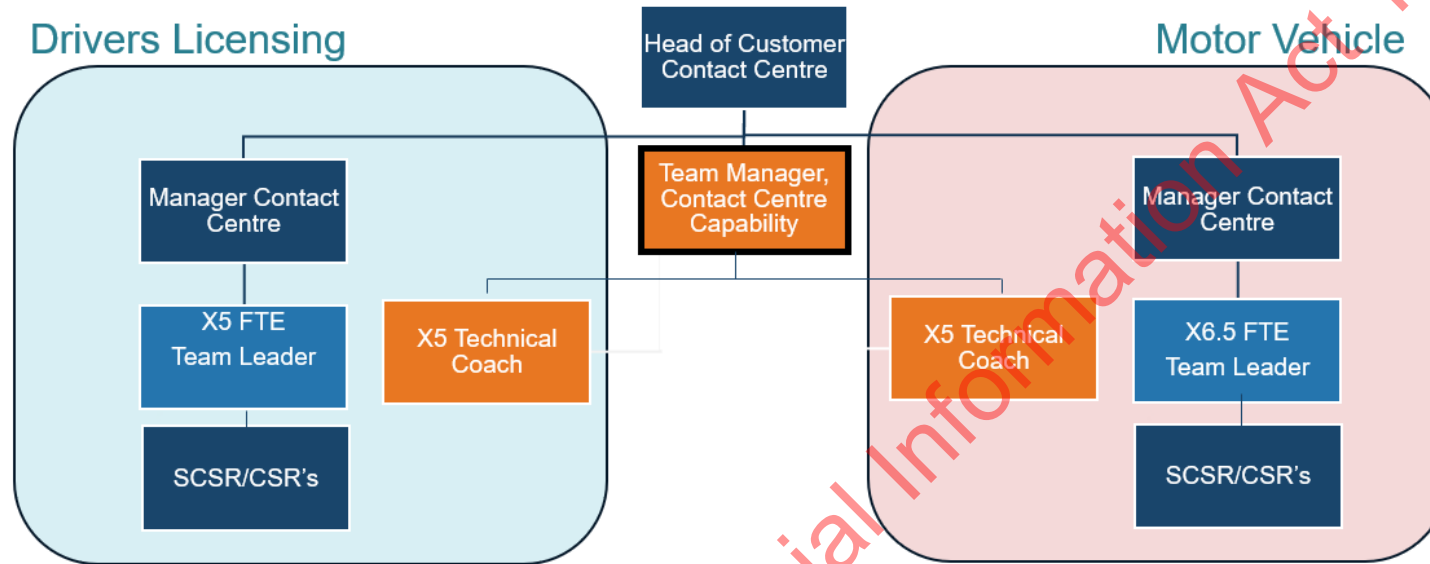
## WORKFORCE IMPACTS

The potential workforce impacts of this proposal are illustrated on the current organisational structure below:

Current Structure – Contact Centre



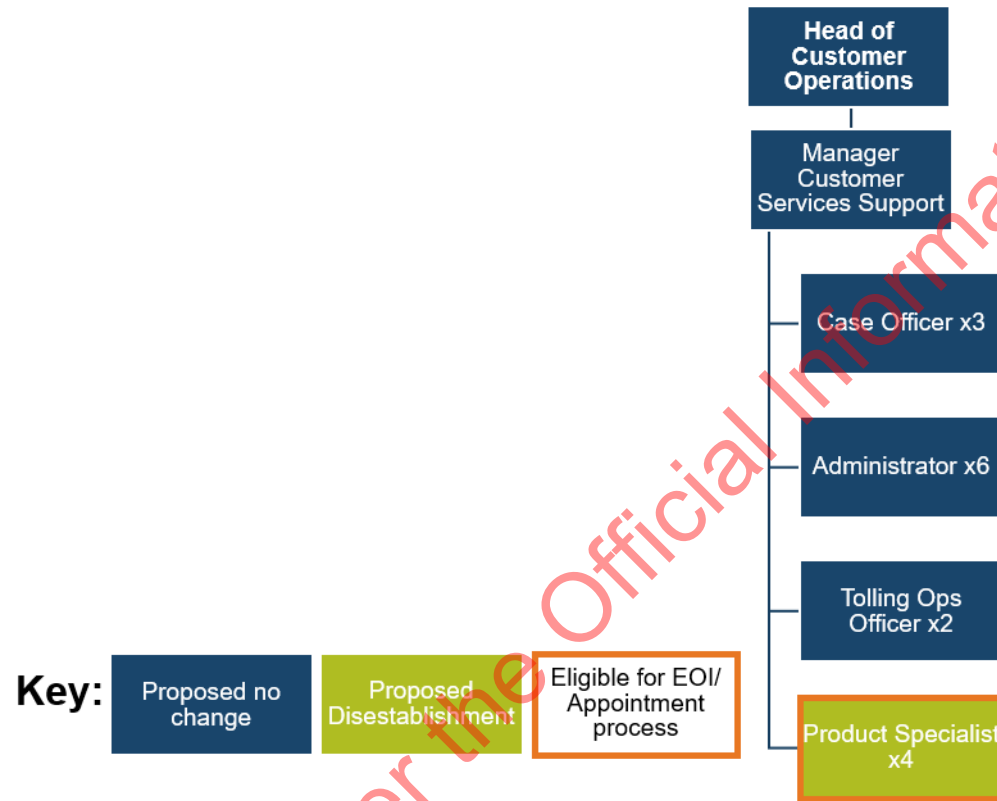
# Proposed Structure – Contact Centre



**Key:**



# Current Structure - Customer Operations



# Proposed Structure – Customer Operations

Key:

Proposed no  
change

New Position

Head of  
Customer  
Operations

Manager  
Customer  
Services Support

Case Officer x3

Administrator x6

Tolling Ops  
Officer x2

Customer  
Operations  
Specialist x2

There are 27 employees (three positions) within scope of the review. For most employees the current proposal would only result in minor changes to their position, and they would be automatically reconfirmed (this may be following an expression of interest or appointment process). The proposal outlines the disestablishment of four Product Specialist positions which will affect four employees. However, the proposal seeks to repurpose these positions into two Operation Support Specialists and two Technical Coaches, which have been identified as suitable alternative positions with training for those potentially affected.

We've designed a transparent and objective processes to appoint people into newly created positions whilst minimising the potential impact on our people. We do not envisage any redundancies resulting from this proposal.

### FINANCIAL IMPACT

The estimate cost implications of this proposed structure are outlined below.

The financial impact has been consulted with Te Mahau Senior Business Accountant Florian of whom is supportive of the changes providing cost increases are offset by a reduction in spending elsewhere within Te Mahau.

#### Approximate Costs

The cost calculations for this proposal have considered the highest remuneration levels and the maximum internal appointment remuneration increase, providing estimates for anticipated costs.

As the go-live date doesn't come into effect until July 2024, there is no additional cost to the 23/24 financial year. The '24/25 Additional Cost' accounts for an indicative 3% increase to accommodate the upcoming remuneration review.

Upon full implementation, we expect the proposed model to help mitigate initial additional costs by reducing telecommunication expenses through improved first call resolution rates and fewer line transfers.

Whilst there is a chance for more position changes within this proposal than the three listed below, they would be considered cost neutral as the roles are already budgeted for or would be repurposed using positions with a higher banding.

Positions	Number of positions	Band Change	24/25 Additional Cost
Team Leader, Contact Centre Capability	1	13 to 14	s 9(2)(a)
Technical Coach	2	15 to 16	s 9(2)(a)
Total	3	-	\$37,337.09

\*For consideration: a separate memo will accompany this business case for the Te Mahau Banding Review. The cost for the banding review is estimated to be \$44,271.21, therefore seeking a total of \$88,608.30.

### RISKS AND MITIGATIONS

Risk	Mitigation
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Delays on the change process	<ul style="list-style-type: none"> <li>• Anticipate potential challenges and allocate sufficient time and resources to address them.</li> <li>• Clear communication with all stakeholders involved in the change process.</li> <li>• Develop contingency plans to address unexpected delays.</li> </ul>
Change disrupts the team and causes anxiety	<ul style="list-style-type: none"> <li>• Clear communications and robust and concise change documentation so people are well informed and understand the purpose of the proposed changes.</li> <li>• Limiting the impact to staff wherever possible.</li> <li>• Ensuring that staff know what support channels are available to them and are encouraged to utilise them.</li> </ul>
Lack of engagement by staff in the process	<ul style="list-style-type: none"> <li>• Clear communication about why these changes are being proposed and how staff can engage in the process.</li> <li>• Ensuring it is clear how people can provide their feedback on the proposal.</li> <li>• Regular communication through various channels including, catch ups/check-ins, regular FAQs, drop-in sessions where people can ask questions and provide their feedback.</li> <li>• Engagement and support from the People Group and Change and Internal Communications team.</li> </ul>
Change process causes loss of focus on continuing priorities	<ul style="list-style-type: none"> <li>• Clear expectations and priorities during change process that are sufficiently resourced.</li> </ul>
Lack of meaningful engagement with diverse groups	<ul style="list-style-type: none"> <li>• Understand the specific needs, preferences of our people and how to ensure meaningful engagement (leader led conversations).</li> <li>• Promote inclusive leadership that champions diversity and encourages involvement through diverse means i.e., incorporating tikanga principles.</li> </ul>

## INDICATIVE TIMEFRAME

The consultation period is proposed to run from 7 May 2024 to 17 May 2024 and we would anticipate bringing a final decision to you for approval by 27 May 2024. We have indicative training dates from 1 July 2024 to 26 July 2023 for those moving into new roles and aim to be in a position to implement any changes by 29 July 2024.

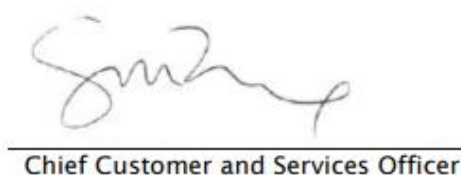
**Submitted by:**

  
Head of Customer Operations

Date:

**23.04.2024**

**Approved by:**

  
Chief Customer and Services Officer

Date:

**23.04.24**