MINISTRY OF BUSINESS, INNOVATION & EMPLOYMENT
HĪKINA WHAKATUTUKI

IN CONFIDENCE

Our Future Services

Benefits Realisation Plan

MINISTRY OF BUSINESS, INNOVATION & EMPLOYMENT
HĪKINA WHAKATUTUKI

1 Document control

1.1 Version history

Date	Version	Author	Description of change
09/09/24	1.0	Privacy of natural persons	Create first draft
20/09/24	1.1		Incorporate feedback from Privacy of natural persons Privacy of natural persons
25/09/24	1.2		Incorporate feedback from Privacy of natural persons
2/12/24	1.3		Updates to benefits measures and ownership

1.2 Endorsed by

This document has been endorsed by:

Name	Role	Version	Date	Signature
Stephen Vaughan	Benefit Owner	1.3	12.12.24	Internal Link
Mark Brown	Benefits Owner	1.2	1.11.24	
Suzanne Boslem	Benefit Owner	1.2	28.10.24	
Richard Owen	Benefit Owner	1.2	25.10.24	
Karen Bishop	Benefit Owner			
Privacy of natural persons	Benefits Owner	1.0	11.09.24	
	Benefits Owner	1.2	05.12.24	
	Programme Director Future Services			
	Benefits Management Advisor			

1.3 Approved by

This document has been approved by:

Name	Role	Version	Date	Signature
Stephen Vaughan, Chief Operating Officer Immigration	Business Owner	1.3	12.12.24	Internal Links
Alison McDonald, Deputy Secretary Immigration	Senior Responsible Officer	1.3	12.12.24	

Contents

2 Benefit Summary

Benefit #	Benefit Type
Project Number	4728
Programme name	Our Future Services
Programme Sponsor	Karen Bishop, General Manager Service Design & Implementation
Senior Responsible Owner	Alison McDonald, Deputy Secretary Immigration
Business Owner	Stephen Vaughan, Chief Operating Officer Immigration
Benefits Owner(s)	Stephen Vaughan, Mark Brown, Suzanne Boslem, Richard Owen, Karen Bishop, McLeish Martin, Privacy of natural persons Alison McDonald
Agencies	MBIE

3 Executive Summary

The Our Future Services work programme is a continuation of work started over the past five years to develop a comprehensive, digitally enabled, immigration service model.

The programme will accelerate the pace of delivery of building all products onto ADEPT in order to leverage efficiency and productivity benefits faster. It also implements improvements to risk capabilities and self-service options to improve customer experience.

The Our Future Services detailed business case identifies four outcome areas which will deliver a leaner and more flexible immigration system that can respond well to change and manages risk more effectively. The outcome areas are:

- **Improved efficiency of services:** Reducing costs through a single digital submission and processing channel that leverages automation capabilities to decrease manual effort.
- **Improved identification and management of risk:** Implementing smart systems to help predict, identify, mitigate and manage risk at the earliest available opportunity.
- **Improved systems agility:** Increasing ability to respond to change, including faster implementation of policy and other critical business change.
- **Improved experience for customers and staff:** Designing with customers in mind to provide more self-service options and ensure they are well informed about what they need to do.

4 Benefits Table

The programme benefits are outlined in the table below. For additional information refer to Appendix A.

Benefit #	Benefit Type	Benefit Name	Benefit Description	Measure	Baseline Measure[1]	Target Measure	Measure Date
1	Cost Saving	Reduced manual efforts for visa applications (Visa decision productivity gain)	The average number of visa applications decided per day with reference to visa product groups identified in the product migration plan	The average number of visa applications decided per day per increases	Non-complex average daily decision output – 15.95 Complex average daily decision output – 2.36	Non-complex decision output per immigration officer increases by 50% Complex decision output per immigration officer increases by 30%	October 2031
2	Cost Saving	Reduced manual efforts for visa applications (Automated Decision Making)	The percentage of visa applications that use automated rules-based decision making	Increase in the number of visa products that use automated decision making and the percentage of each product which is automatically decided	0 applications are decided automatically	40% of Visitor Visas are automatically decided 80% of Resident Visa Transfers & Confirmations are automatically decided 80% of Temp Visa Transfers are automatically decided 40% of Working Holiday Scheme applications are automatically decided	September 2030

[1] Any not yet available baseline measures will be developed during phase 1 of the programme

Benefit #	Benefit Type	Benefit Name	Benefit Description	Measure	Baseline Measure[1]	Target Measure	Measure Date
						40% of APEC Business Visitor Visas are automatically decided	
3	Cost Saving	Reduction in licencing and maintenance cost for legacy visa processing and submission channels	Expenditure on core legacy systems	Reduction in expenditure on core legacy systems	$30m per annum as at the end of FY23/24	$15.7m plus inflation per annum from FY32/33	June 2033
4	Cost Saving	Reduced inbound contact to the Customer Service Centre	The number of inbound calls answered and emails responded to by the Customer Service Centre	Reduction in the number of inbound calls answered and emails responded to by the Customer Service Centre	Annual Service Centre calls answered is 814,216 Annual Service Centre emails responded to is 48,984	20% annual reduction in calls 40% annual reduction in emails $19m saving	October 2031
5	Cost Saving	Reduction in postage and storage costs	Reduction in postage and storage costs due to removing paper applications	Costs for postage and storage	$1.2m per annum	$0.2m per annum	June 2031
6	Cost Avoidance	Immigration harm	Development of an Immigration Harm Index	Reduction in Immigration Harm ($ cost of harm)	Not yet available	5% - 10% reduction in immigration harm	October 2031

Benefit #	Benefit Type	Benefit Name	Benefit Description	Measure	Baseline Measure[1]	Target Measure	Measure Date
7	Cost Avoidance	Reduction in harm prevented before visa applicants arrive in New Zealand	Ratio of harm prevented before visa applicants arrive in NZ to harm occurring after visa applicants have arrived	The proportion of applicants not arriving due to declines, withdrawals, offloads, and turnarounds	Not yet available	Uplift in the range of 20% to 30%	October 2031
8	Cost Avoidance	Reduction in harm occurring after visa applicants arrive in New Zealand	Ratio of harm prevented before visa applicants arrive in NZ to harm occurring after visa applicants have arrived	The proportion of applicants arriving and experiencing adverse outcomes	Not available	Reduction in the range of 20% to 30%	October 2031
9	Improved Services: Internal	Ability to identify and respond to new and emerging risks	Deployment of risk rules	Time to introduce, review, adjust, modify, and remove risk rules	Not available	20% reduction in time taken	October 2031
10	Technical Risk Reduction	Level of technology system risk	The number of ICT system risks	Reduction in the number of ICT system risks	33.4	18	December 2027
11	Improved Services: Internal	Policy and critical business change implementation	Time to implement policy change	The time to implement complex (new or amendments to policy settings) change in within our enhanced immigration online platform	Not available	20% improvement	October 2031

Benefit #	Benefit Type	Benefit Name	Benefit Description	Measure	Baseline Measure[1]	Target Measure	Measure Date
12	Improved Services: External	Increase in customer satisfaction (Overall satisfaction)	Percentage of customers satisfied with the overall experience of applying for a visa	Average overall Customer Experience Survey satisfaction score over the last 12 months (visa applicants)	77%	86-89%	October 2031
13	Improved Services: External	Increase in customer satisfaction (Ease of use)	The percentage of customers satisfied using the paper application form and the percentage of customers satisfied using the online application form	Average satisfaction score for applying for a visa using the paper application form and average satisfaction score using the online application form over the last 12 months (visa applicants)	69% (paper) 84% (online)	89-92%	October 2031
14	Improved Services: Internal	Employee experience with systems and processes	Visa processing staff satisfaction with using INZ processing systems.	Visa processing staff satisfaction with using INZ processing systems; the extent to which they say that this enables them to do their job	Not available	40% improvement	October 2031

5 Benefit Ownership

The project Benefits and Measures and their owners are outlined in the table below. Each benefit should have one owner and each measure should have one owner.

Benefit #	Benefit Name	Benefit Owner Name	Benefit Owner Substantive Position	Measure	Measure Owner Name
1	Reduced manual efforts for visa applications (Visa decision productivity gain)	Stephen Vaughan	Chief Operating Officer Immigration	Increase in the average number of visa applications decided per day	Privacy of natural persons
2	Reduced manual efforts for visa applications (Automated Decision Making)	Stephen Vaughan	Chief Operating Officer Immigration	Increase in the number of visa products that use automated decision making and the percentage of each product which is automatically decided	
3	Reduction in licencing and maintenance cost	Mark Brown [interim]	General Manager Digital Operations	Reduction in expenditure on core legacy systems	
4	Reduced inbound contact to the Customer Service Centre	Suzanne Boslem	General Manager Engagement & Experience	Reduction in the number of inbound calls answered and emails responded to by the Customer Service Centre	
5	Reduction in postage and storage costs	TBD	TBD	Reduction in postage and storage costs	
6	Reduction in immigration harm	Richard Owen	General Manager Immigration Risk & Border	Definition and measurement of immigration harm	
7	Reduction in harm prevented before visa applicants arrive in New Zealand	Richard Owen	General Manager Immigration Risk & Border	The proportion of applicants not arriving due to declines, withdrawals, offloads and turnarounds	
8	Reduction in harm occurring after visa applicants arrive in New Zealand	Richard Owen	General Manager Immigration Risk & Border	The proportion of applicants arriving and experiencing adverse outcomes	

Benefit #	Benefit Name	Benefit Owner Name	Benefit Owner Substantive Position	Measure	Measure Owner Name
9	Ability to identify and respond to new and emerging risks	Richard Owen	General Manager Immigration Risk & Border	The time it takes to deploy a new risk rule and modify an existing risk rule	Privacy of natural persons
10	Level of technology system risk	Mark Brown [interim]	General Manager Digital Operations	Reduction in the number of ICT system risks	
11	Policy and critical business change implementation	Karen Bishop & Privacy of natura	General Manager Service Design & Implementation Head of Digital & Programmes INZ - DDI	The time to implement complex (new or amendments to policy settings) change in within our enhanced immigration online platform	
12	Increase in customer satisfaction (Overall satisfaction)	McLeish Martin	General Manager Customer	Average overall Customer Experience Survey satisfaction score over the last 12 months (visa applicants)	
13	Increase in customer satisfaction (Ease of use)	McLeish Martin	General Manager Customer	Average satisfaction score for applying for a visa using the paper application form and average satisfaction score using the online application form over the last 12 months (visa applicants)	
14	Employee experience with systems and processes	Alison McDonald	Deputy Secretary Immigration	Visa processing staff satisfaction with using INZ processing systems; the extent to which they say that this enables them to do their job	

6 Benefits Schedule

The project Benefits schedule is outlined in the table below.

Benefit #	Benefit Name	Target Measure	Baseline Measure & Date		Target Measure & Date	Target Measure & Date	Target Measure & Date
Outcome Area 1: Improved efficiency of services							
1	Reduced manual efforts for visa applications (Visa decision productivity gain)	Non-complex decision output per immigration officer increases by 50% Complex decision output per Immigration officer increases by 30%	Non-complex average daily decision output – 15.95 Complex average daily decision output – 2.36 11/06/2024	Target	**Phase 1 Target** **Feb 25 – June 26** By the end of Phase 1 the non-complex average daily decision output per immigration officer increases by 7.64% (17.17) from baseline. By the end of Phase 1 the complex average daily decision output per immigration officer increases by 2.11% (2.41) from baseline	**Phase 2 Target** **July 26 – June 28** By the end of Phase 2 the non-complex average daily decision output per immigration officer increases by 37.36% (21.91) from baseline By the end of Phase 2 the complex average daily decision output per immigration officer increases by 13.13% (2.67) from baseline	**Phase 3 Target** **July 28 – Oct 31** By the end of Phase 3 non-complex decision output per immigration officer increases by 50% (23.94) from baseline By the end of Phase 3 complex decision output per immigration officer increases by 30% (3.07) from baseline
2	Reduced manual efforts for visa applications	40% of Visitor Visas are automatically decided	0 applications are automatically decided	Target	**Phase 1 Target** 0 applications are automatically decided	**Phase 2 Target** By the end of Phase 2: 40% of Visitor Visas are automatically decided	**Phase 3 Target** By the end of Phase 3: 40% of Visitor Visas are automatically decided

Benefit #	Benefit Name	Target Measure	Baseline Measure & Date		Target Measure & Date	Target Measure & Date	Target Measure & Date
	(Automated Decision Making)	80% of Resident Visa Transfers & Confirmations are automatically decided 80% of Temp Visa Transfers are automatically decided 40% of Working Holiday Scheme applications are automatically decided 40% of APEC Business Visitor Visas are automatically decided	01/09/24			80% of Resident Visa Transfers & Confirmations are automatically decided 80% of Temp Visa Transfers are automatically decided	80% of Resident Visa Transfers & Confirmations are automatically decided 80% of Temp Visa Transfers are automatically decided 40% of Working Holiday Scheme applications are automatically decided 40% of APEC Business Visitor Visas are automatically decided
Level of monetised benefit to be achieved – Benefit 1 & 2				Target	**Phase 1 Target** $3m	**Phase 2 Target** $72m (accumulative)	**Phase 3 Target + one year** $345m (accumulative)
3	Reduction in licencing and	$15.7m plus inflation per	$30m per annum as at the end of FY23/24	Target	**Phase 1 Target**	**Phase 2 Target** Legacy system total cost reduced to $24.4m per	**Phase 3 Target + one year** Legacy system total cost reduced to $15.7m per

Benefit #	Benefit Name	Target Measure	Baseline Measure & Date		Target Measure & Date	Target Measure & Date	Target Measure & Date
	maintenance cost	annum from FY32/33				annum include inflation adjustments at the end of FY27/28.	annum include inflation adjustments at the end of FY31/32.
Level of monetised benefit to be achieved – Benefit 3					**-**	**$8.4m**	**$86m (accumulative)**
4	Reduced inbound contact to the Customer Service Centre	20% annual reduction in calls 40% annual reduction in emails	Annual Service Centre calls answered is 814,216 Annual Service Centre emails responded to is 48,984 01/07/2024	Target	**Phase 1 Target** -	**Phase 2 Target** By the end of March 2027 there will be an annual reduction of 44,476 calls (5% reduction) - this equates to 9 FTE By the end of March 2027 there will be an annual reduction of 8,320 emails (17% reduction) – this equates to 1 FTE By the end of March 2028 there will be an annual reduction of 138,372 calls (17% reduction) - this equates to an additional 19 FTE	**Phase 3 Target** By the end of April 2031, there will be an annual reduction of 162,891 calls per year (20% reduction) - this equates to an additional 5 FTE By the end of April 2031, there will be an annual reduction of 19,604 emails per year (40% reduction) - this equates to an additional 1 FTE

Benefit #	Benefit Name	Target Measure	Baseline Measure & Date		Target Measure & Date	Target Measure & Date	Target Measure & Date
						By the end of March 2028 there will be an annual reduction of 16,640 emails per year (34% reduction) - this equates to an additional 1 FTE <u>This equates to a total of 30 FTE by the end of March 2028</u>	<u>This equates to a total of 36 FTE at the end of Phase 3</u>
Level of monetised benefit to be achieved – Benefit 4				Target	-	$2.2m	**Phase 3 Target + one year** $19m (accumulative)
5	Reduction in postage and storage costs	$0.2m plus inflation per annum from FY30/31	$1.2m per annum as at the end of FY23/24	Target	**Phase 1 Target** 0% realised	**Phase 2 Target** 0% realised	**Phase 3 Target + one year** $0.2 per annum include inflation adjustments from FY30/31
Level of monetised benefit to be achieved – Benefit 5					-	-	**$3m (accumulative)**
Outcome Area 2: Improved identification and management of risk							

Benefit #	Benefit Name	Target Measure	Baseline Measure & Date		Target Measure & Date	Target Measure & Date	Target Measure & Date
6	Reduction in immigration harm	Not yet available	Reduction in Immigration Harm ($ cost of harm)	Target	**Phase 1 Target** -	**Phase 2 Target** 2% - 5% reduction in immigration harm	**Phase 3 Target** 5% - 10% reduction in immigration harm
7	Reduction in harm prevented before visa applicants arrive in New Zealand	Not yet available	TBC		**Phase 1 Target** -	**Phase 2 Target** Uplift in the range of 10% to 20%	**Phase 3 Target** Uplift in the range of 20% to 30%
8	Reduction in harm occurring after visa applicants arrive in New Zealand	Not yet available	TBC	Target	**Phase 1 Target** -	**Phase 2 Target** Reduction in the range of 10% to 20%	**Phase 3 Target** Reduction in the range of 20% to 30%
9	Ability to identify and respond to new and emerging risks	100% realised	Not available	Target	**Phase 1 Target** 10% reduction in time taken	**Phase 2 Target** 20% reduction in time taken	**Phase 3 Target** 100%
Outcome Area 3: Improved systems agility							
10	Level of technology system risk	18	Average number of ICT risks between April 2023 and April 2024 is 33.4 10/07/2024	Target	**Phase 1 Target** -	**Phase 2 Target** 18	**Phase 3 Target** 18

Benefit #	Benefit Name	Target Measure	Baseline Measure & Date		Target Measure & Date	Target Measure & Date	Target Measure & Date
11	Policy and critical business change implementation	100% realised	Not available	Target	**Phase 1 Target** -	**Phase 2 Target** 5% improvement	**Phase 3 Target** 20% improvement
Outcome Area 4: Improved experience for customers and staff							
12	Increase in customer satisfaction (Overall satisfaction)	86-89%	Average overall Customer Experience Survey satisfaction score over the last 12 months (visa applicants) 77% to March 2024	Target	**Phase 1 Target** 85-86%	**Phase 2 Target** 86-88%	**Phase 3 Target** 86-89%
13	Increase in customer satisfaction (Ease of use)	89-92%	Average satisfaction score for applying for a visa using the paper application form and average satisfaction score using the online application form over the last 12 months (visa applicants) 69% (paper) 84% (online) to March 2024	Target	**Phase 1 Target** 69% 88-89%	**Phase 2 Target** 0% 88-91%	**Phase 3 Target** 89-92%

Benefit #	Benefit Name	Target Measure	Baseline Measure & Date		Target Measure & Date	Target Measure & Date	Target Measure & Date
14	Employee experience with systems and processes	100% realised	Not available (to be measured through survey)	Target	**Phase 1 Target** -	**Phase 2 Target** 10% improvement	**Phase 3 Target** 40% improvement

7 Benefits Realisation Activities

Describe specific benefit realisation activities including modifying benefits realisation plan, profile changes, adding new benefits, reporting responsibilities and when these occur and what the expected triggers are.

TO BE COMPLETED

7.1 How will the benefits plan be managed?

The realisation of monetised benefits is essential for the funding of the programme. Business owners for each benefit area have accepted and endorsed these benefits and will be responsible for delivery of these benefits.

A full-time role will be created in the programme with responsibility for the benefits realisation plan and reporting on progress.

The Programme Board (chaired by the SRO) will monitor any changes, including changes to outputs and outcomes.

Each benefit has an owner who has nominated a person responsible for providing information and data at regular checkpoints throughout the programme (Measure Owner).

The expected benefits are based on a number of operating environment assumptions regarding the operational context of the immigration system at the time this business case and corresponding benefits were developed. These assumptions can be found in Appendix Nine of the business case.

The assumptions will be reviewed every six months and any changes to these will have an impact on the benefits stated.

Outcome Area 1: Improved efficiency of service

Benefit 1 - Average number of visa applications decided per day & **Benefit 2** - The percentage of visa applications that use automated rules-based decision making

Productivity gains
Improvements in visa processing efficiency will be achieved as each product is built onto ADEPT due to automation of data entry, fee receipting, health case matching and character check determination. End-to-end automation will be implemented for five low risk and low complexity products.
A benefits model has been developed which identifies baseline productivity (average daily decisions per immigration officer for each product group) and assumed productivity for each visa product once it is migrated to ADEPT. Observed activity from Permanent Resident Visa migration to ADEPT (190% increase) was used to inform the assumptions, however a more conservative productivity increase has been applied, as follows:

- 50% productivity increase to the number of visa applications decided per day for non-complex products (defined as more than 5 decisions per day per immigration officer)
- 30% productivity increase to the number of visa applications decided per day for complex products (defined as 5 decisions or less per day per immigration officer).

Increased productivity will result in a reduction in visa processing FTE representing savings of **$344m**.

Productivity gains will be measured in line with the Product Migration Plan/ Roadmap (as per page 107 of the business case), e.g. implementation of the first product group onto ADEPT under the programme (International Student and Family) is in September 2025, with a 5-month delay before FTE benefits are to be realised in February 2026. The following time lags are applied to benefits realisation:

- Five month delay for the first two product group drops
- Three month delay for all subsequent product group drops
- Three month delay Automated Decision Making (ADM) drops for products which are based on risk rules (Low Risk Visitor Visa, Working Holiday Scheme and APEC Business Visitor Visa)
- At implementation for ADM drops which are based on business rules (Resident Visa Transfers & Confirmations and Temporary Visa Transfers) - business rules will form part of the build for these product groups and ADM is therefore assumed from the date these products are migrated to ADEPT.

Productivity will be closely monitored before, during and following the migration of each product group to ADEPT.
Baselines will be formally reviewed quarterly to ensure that changes are attributable to the programme, rather than other internal or external factors. Baselines will be re-set if required.

<u>FTE Reduction - Attrition</u>
FTE savings have been phased into the programme cost model according to the visa product migration plan, and realisation delays indicated above.

A reduction of 497 FTE over seven years across visa processing is projected, delivering savings of $344m.
The table below shows the FTE reduction for each role identified within scope.

	Immigration officer	**Immigration Manager**	**Technical Advisor**	**Practice Lead**	**Visa Operations Manager**	**Support Officer**	**Identity resolution**	**Verification Officer**	**Total FTE**
Total FTE	Free and frank opinions								**-497**

The tables below provide further detail on savings by product group, role and date which will be used to inform the Attrition Plan.

Benefit realisation by product group, date and role

Products	Realisation Date	Immigration Officer	Manager (IO)	Technical Advisor	Practice Lead	Visa Operations Manager	Verification Officer	Support Officer	Manager (SO)	Identity Resolvers
International Student & Family	1/02/2026	Free and frank opinions								
Transit and Visitor Groups	1/06/2026									
Visitors	1/06/2026									
Temp - Family of a worker	1/07/2026									
Temp Work IGMS	1/12/2026									
MEPV & WVA	1/12/2026									
Family of NZ cit/res	1/12/2026									
Skilled Residence	1/07/2027									
Working Holiday	1/08/2027									
Limited	1/10/2027									
Visitors ADM	1/11/2027									
Res Visa Transfers & Confirmation	1/03/2028									
PAC & SQ	1/03/2028									
Temp Visa Transfers	1/07/2028									
Parent Res	1/10/2028									
Work VOC	1/11/2028									
APEC Business VV's	1/01/2029									
Working Holiday ADM	1/02/2029									
Active Investor	1/05/2029									
Skilled Migrant Category	1/06/2029									
Temp – other humanitarian	1/10/2029									
Recognised Seasonal Employer	1/11/2029									
NZ Cit Endorsement	1/12/2029									
Humanitarian Res	1/03/2030									
Temp work paper	1/05/2030									
Parent Retirement	1/08/2030									
APEC Business VV's ADM	1/09/2030									
Refugee Quota	1/10/2030									
Fishing	1/12/2030									
Section 61	1/01/2031									
Entertainment	1/04/2031									
Entrepreneur	1/05/2031									
Foreign Mission & Military	1/08/2031									
										Total = 497

Benefit realisation by product group, date and total FTE phased

	Products	ADEPT go-live date	Realisation Date	FY24/25	FY25/26	FY26/27	FY27/28	FY28/29	FY29/30	FY30/31	FY31/32	Ir
	International Student & Family		1/02/2026	Free and frank opinions								
	Transit and Visitor Groups		1/06/2026									
	Visitors		1/06/2026									
	Temp - Family of a Worker		1/07/2026									
	Temp Work IGMS		1/12/2026									
	MEPV & WVA		1/12/2026									
	Family of NZ cit/ res		1/12/2026									
	Skilled Residence		1/07/2027									
	Working Holiday		1/08/2027									
	Limited		1/10/2027									
ADM related	Visitors		1/11/2027									
	Res Visa Transfers & Confirmation		1/03/2028									
	PAC & SQ		1/03/2028									
	Temp Visa Transfers		1/07/2028									
	Parent Res		1/10/2028									
	Work VOC		1/11/2028									
	APEC Business VV's		1/01/2029									
ADM related	Working Holiday		1/02/2029									
	Active Investor		1/05/2029									
	Skilled Migrant Category		1/06/2029									
	Temp - other humanitarian		1/10/2029									
	Recognised Seasonal Employer		1/11/2029									
	NZ Cit Endorsement		1/12/2029									
	Humanitarian Res		1/03/2030									
	Temp work paper		1/05/2030									
	Parent Retirement		1/08/2030									
ADM related	APEC Business VV's		1/09/2030									
	Refugee Quota		1/10/2030									
	Fishing		1/12/2030									
	Section 61		1/01/2031									
	Entertainment		1/04/2031									
	Entrepreneur		1/05/2031									
	Foreign Mission & Military		1/08/2031									
	Total											

*Does not include x3 Identity Resolver roles

Attrition modelling has been completed at the pre-programme delivery stage in August 2024 which indicates that for the four roles listed below realisation of the benefits can be achieved through natural attrition in line with product migration i.e. the level of expected attrition between the date that a product goes live on ADEPT and the date that the associated benefits need to be realised is sufficient to meet the required reduction in FTE.

- Immigration Manager (Immigration officer)
- Immigration Manager (Support Officer)
- Practice Lead
- Visa Operations Manager

For the remaining four roles listed below, the required FTE savings cannot be realised through natural attrition in line with the related product groups going live in ADEPT, and we would need to reduce roles (choose not to back fill) in anticipation of products moving to the platform.

- Immigration officer
- Technical Advisors
- Verification Officer
- Support Officer

The attrition rates which have been applied are averages across the business per role. It is likely that attrition will not correspond with the location of the sites where products being built in ADEPT are currently processed. For example, for the Student product build, we need to deliver a reduction of 28 Immigration officer roles in February 2026 - it is unlikely there will be sufficient attrition in the current student processing sites of Palmerston North and Porirua to realise this benefit.

The attrition approach therefore will be supported by a training and upskilling plan. Immigration officers who process a visa product where FTE savings are made but where there is no natural attrition, would need to be reassigned to process visa products currently processed in a different location.

A detailed Attrition and Training Plan will be developed as part of this Benefits Realisation Plan pre-delivery.

<u>**Benefit 3** - Reduction in licencing and maintenance cost</u>

As legacy visa processing and submission systems are decommissioned annual licence costs will be realised.

- IGMS – annual licence cost of $12.4m (decommissioned at the end of December 2027, realisation from January 2028)
- Plone – annual licence cost of $1m (decommissioned at the end of September 2029)
- AMS – will remain as the system of record. We have assumed a 25% saving against the annual licence cost of $7m. The target state of AMS will be implemented in October 2031, resulting in annual savings of $1.75m.

In addition to licence costs, savings in annual legacy system enhancement and policy implementation costs will be realised.

- IGMS – using the FY24/25 budget allocation, $3.5m is budgeted for implementing policy, business enhancements and technical optimisation for IGMS. Following decommissioning, we have assumed that $1.5m will move to the core ADEPT team to implement policy change and the remaining $2m will be realised as monetised benefits on an ongoing basis (from January 2028).

- AMS – using the FY24/25 budget allocation, $6m is budgeted for implementing policy, business enhancements and technical optimisation for AMS. Following implementation of the target state for AMS, we have assumed a $3.5m annual saving on and ongoing basis (from November 2031).

The realisation of savings associated with system enhancement and policy implementation costs will be achieved through either re-allocation of resourcing to the DDI capability pools in other MBIE portfolios or through attrition. Resourcing and recruitment activity will be monitored in the year leading up to the system decommissioning.

Over the life of the programme, a monetisable benefit of **$86m** will be realised from legacy system decommissioning.

<u>**Benefit 4** - Reduced inbound contact to the Customer Service Centre</u>

As improvements are made to the ADEPT platform to deliver a more intuitive and customer focused digital experience, we have assumed a reduction in the number of calls to the Customer Service Centre, particularly in relation to application status updates.

The programme will enable clearer information and increasing self-service capabilities for customers providing a more consistent and customer-centric experience. Benefits of reduced calls and emails to the Customer Service Centre have been assumed informed by discussions with Business Insights and Workforce Planning teams and the General Manager Engagement and Experience, Te Whakatairanga Service Delivery, who has oversight of the Customer Service Centres.

We have assumed a 20% reduction in call volume and 40% reduction in email volume as further products are migrated to ADEPT and the corresponding Customer Service Agent FTE savings (36 FTE).

The phasing approach to benefits realisation aligns with transitioning visa application volume to the ADEPT system. 85% of visa volume transitions to ADEPT across Phase 1 and Phase 2 of the Programme. A broadly proportionate reduction in inbound calls and emails has therefore been applied. A 5% reduction in call volume will be realised by the end of March 2027 (in Phase 2), a 17% reduction will be realised at the end of March 2028 (in Phase 2) and a 20% reduction will be realised by the end of April 2031 (Phase 3). The reduction in emails is phased broadly equally over the life of the programme.

It is assumed that FTE savings will be realised through an attrition approach which will be carefully managed. The annual attrition rate for Client Service Advisers in the 2024 Financial Year is 32%, which is similar across previous years, so it is assumed that benefits will be realised through natural attrition.

A monetisable benefit of **$19m** will be realised from FTE savings.

<u>**Benefit 5** – Reduction in postage and storage costs</u>

The reduction in postage and storage costs due to removing paper applications will result in **$3m** in savings by October 2031 when paper applications are removed from the system.

Outcome Area 2: Improved identification and management of risk

<u>**Benefit 6** - Reduction in immigration harm</u>

Baseline not available. An Immigration Harm Index is being developed which will be available in June 2026.

Benefit 7 - The proportion of applicants not arriving due to declines, withdrawals, offloads and turnarounds

TBC – Baseline not available.

Benefit 8 - The proportion of applicants arriving and experiencing adverse outcomes

TBC – Baseline not available.

Benefit 9 - Ability to identify and respond to new and emerging risks

Baseline not yet available. A qualitative review will be completed within the first six months of the Programme to create the baseline performance. The rules management, decision intelligence support and analytics platform scope items will be implemented in phase two of the programme and are drivers for improvement in this benefit area.

Outcome Area 3: Improved systems agility

Benefit 10 - Level of technology system risk

50% of technology risks are related to IGMS. On this basis this measure is focussed on eliminating these risks. The timing of the realisation of the benefit aligns with the timing for decommissioning IGMS.

Most products currently on IGMS and those with the highest volumes are due to be migrated to ADEPT in Phase 1 of the Programme with remaining IGMS products migrated in Phase 2. On this basis we have taken out all risks that relate to IGMS, leaving 18 ICT risks at the end of Phase 2 in June 2028.

Regular reporting on ICT risk will be established for the programme.

Benefit 11 - Policy and critical business change implementation

Baseline not yet available. This will be measured through a case study completed by June 2025. The case study will set our baseline and will be reported on at the end of each phase of the programme.

Outcome Area 4: Improved experience for customers and staff

Benefit 12 - Increase in customer satisfaction (Overall satisfaction) and **Benefit 13** - Increase in customer satisfaction (Ease of Use)

These benefits will be measured quarterly through the Customer Experience Survey and as products are migrated to ADEPT.

Benefit 14 - Employee experience with systems and processes

Baseline not yet available. This will be measured through a staff survey which will be completed by June 2025. Updates will be completed by and reported on at the end of each phase of the programme.

7.2 Reviews

The Programme Board will monitor any changes, including changes to outputs and outcomes. Changes to benefits and/ or the measures/ schedules, will be made via a change request and updated accordingly into Project Online.

A formal review process will occur bi-annually, linked to the review of core operating environment assumptions (Appendix Nine of the business case) and a reporting system will be established. Benefit monitoring (including baseline reviews) is expected to be completed at least monthly during the implementation phase.

Where any changes to benefits or measures are identified, the Programme Director will engage the relevant stakeholder to agree the benefit statement and appropriate measure/s.

A review of benefits or measures may be triggered by:

1. an agreed change in programme scope
2. identification of a business benefit not initially identified
3. change to programme funding timing
4. an issue that materialises and impacts the programme's ability to deliver the benefit
5. any changes to the core set of operating environment assumptions
6. reaching the target measurement timeframe.

The Business Owner, Benefit Owner and Measure Owner will conduct a joint review of the benefit and associated measures.

The review of the Benefits Realisation Plan will be conducted quarterly for the life of the programme, including, for example whether baselines have changed and whether forecast volume has changed and why.

Measure Owners are responsible and accountable for the delivery of information and data supporting realisation for each benefit measure.

An extraordinary review may be implemented at any time at the direction of the Programme Board, e.g. if internal or external forces change baseline measures.

Review #	Event review aligns with	Review Date
1	The first approved version of this plan is developed to support the initial business case.	12-12-2024
2	This document will be reviewed and updated 3 months from the date the initial business case was approved to create the second version on the document. The updated version will include updated schedule and measure information. The Benefits Realisation Manager is responsible for this action.	06-2025 (exact date TBC)
3		
4		
5		

8 Assumptions

Assumption	Description
General	• 3% inflation applied to estimated costs (including vendor costs) and to account for CAPP • 20% programme contingency based on programme risk assessments (Risk Profile Assessment, Strategic Assessment, and Quantitative Risk Analysis) • Capital costs are accounted for in years when the initial spend is forecast to occur rather than phased as depreciation into future years. • Changes to licence and support costs have been factored in, following implementation of the new capability or build of visa product onto ADEPT.
Programme costs and resources	• ADEPT additional licence cost includes a 25% increase on the current fixed licence cost of $5.5m pa plus year-on-year inflation. Only the increased portion of the fixed licence is accounted as programme costs as the rest is covered by existing baseline. • Variable cost of support and consumption for ADEPT licence is based on the current cost of $18 per application plus inflation. The cost of Visitor Visa has been used as a proxy. • New technical delivery teams are costed based on a combination of vendor and MBIE rates except one of the ADEPT platform migration teams. This team is assumed to be fulfilled by recruiting internal staff that are costed at the top of the MBIE salary band. • New resources (outside of technical teams) are costed at the top of the MBIE salary band • Existing resource costs are excluded. This is because the programme will not change participating existing resources' current work scope, hence there is no opportunity cost element. • The capability uplift cost assumes 100 Immigration Officers become Senior Immigration Officers from the start of phase 3 based on max pay band. • Capital charge is excluded because the forecast programme capital cost of $9m is minimal, capital charge impact is expected to be low. MBIE is also reviewing the capital charge allocation methodology, the charge amount cannot be reasonably estimated until the new methodology is finalised.

Productivity gain – visa processing	• 50% productivity increase to the number of visa applications decided per day for non-complex products is a reasonable/ conservative approach and achievable. • 30% productivity increase to the number of visa applications decided per day for complex products is a reasonable/ conservative approach and achievable.
Productivity gain – visa processing	Straight through processing applied to the following products is a reasonable/ conservative approach and achievable: • Low Risk Visitor Visas (40% of Visitor Visa volume) • Temporary Visa Transfers (80% of volume) • Resident Visa Transfers and Confirmations (80% of volume) • Working Holiday Scheme Visas (40% of volume) • APEC Business Visitor Visas (40% of volume)
Productivity gain – visa processing	Savings to be realised three months following the go-live of a visa product on ADEPT, expect for the first two products (Students and Visitors Groups) which are to be realised five months following implementation.
Visa application volumes	Visa volumes are based on projected forecasts as at June 2024 and are forecast to increase until 2029 and then stabilise through to 2033.
Automated Decision Making	ADM benefits are 'pure' - it is assumed that nothing falls out of ADM for intervention. This is because validations occur before triage, so the percentage applied – 40% or 80% represents the entire ADM gain.
Automated Decision Making	The deployment of ADM to products which are based on risk rules – low risk Visitor Visor, Working Holiday Scheme and APEC Business Visitor Visa (40% of volume for each product) will involve a 9-month period for model development (substantially completed for Visitor Visas) followed by a 9-month period to 'connect and evaluate' to enable the system to learn before ADM is turned on, and a 3-month period of technical work to enable ADM as per the Migration Plan. ADM is assumed for these products from the dates indicated above i.e. +3 months post implementation.
Automated Decision Making	The deployment of ADM to products which are based on business rules (80% of volume for each product) applied to Resident Visa Transfers & Confirmations and Temporary Visa Transfer product groups is applied at implementation, rather than the delayed approach for risk rule-based products. This is because business rules (rather than risk rules) will form part of the build for these product groups.

Productivity gain – Customer Service Centre	20% reduction in customer inbound calls and 40% reduction in email correspondence to the Customer Service Centre. Achievement of benefit to be realised gradually over the life of the programme: • FTE at the end of March 2027 • Additional 20 FTE at the end of March 2028 • Additional 6 FTE at the end of October 2031.
Monetised benefits	• Monetised efficiency gains are based on the mid-point salary pay band • Annual monetised gains include overheads and annual pay ladder progression step increases. • Savings to be realised in specified dates in line with the visa product migration plan from February 2026 through to August 2031.
Attrition approach	FTE efficiency benefits will be realised using an attrition approach. A plan will be developed with Workforce Planning, Performance & Reporting and Visa Operations to manage attrition.
Attrition modelling – visa processing	Attrition rates (average attrition rate over the 6 months to July 2024 and 12 months to July 2024) remain steady and are not significantly influenced by internal or external forces. These are: • Immigration officer – 16% • Support Officer – 29% • Immigration Manager 17% • Practice Lead – 23% • Technical Advisor – 5% • Verification Officer – 5% • Visa Operations Manager – 30% (As per the attrition modelling provided by Planning (Workforce), Chief Operating Officer Branch.)
Attrition rates – Customer Service Centre	Attrition rate for Client Service Advisors of 32% (average attrition in the year to June 2024) remains steady and is not significantly influenced by internal or external forces. (As per the attrition modelling provided by Workforce Planner, Customer Service Centre Support, TWSD.)
Resourcing	The programme will have the dedicated capacity and capability to deliver the benefits.

9 Constraints

Constraint	Description
Co-existence	This is not a new constraint as it currently exists today. Current IT systems need to be maintained alongside the new ADEPT platform and some staff experience both the new and old way of working simultaneously.
Policy	Some policy changes may be required to support the programme (as outlined on page 69 of the DBC).
Funding (to be updated)	Funding constraints are related to the need to stay within certain costs in order to not impact the monetary benefits the programme achieves.

10 Dependencies

Dependency	Description
Productivity gain	Performance & Reporting and Visa Operations will have systems in place to monitor and measure productivity gains (visa decisions per day per Immigration officer) in line with product groups identified in the product migration plan.
Benefits monitoring	Measure Owners are responsible and accountable for the delivery of information and data supporting realisation for each benefit measure.
Benefits profile	Benefit 6: Definition and measurement of immigration harm to be developed by May 2026.
Benefits profile	Benefit 7: The proportion of applicants not arriving due to declines, withdrawals, offloads and turnarounds – in development.
Benefits profile	Benefit 8: The proportion of applicants arriving and experiencing adverse outcomes – in development.
Benefits profile	Benefit 9: Ability to identify and respond to new and emerging risks. A qualitative review will be completed by June 2025 to create the baseline performance
Benefits profile	Benefit 11 - Policy and critical business change implementation, baseline not available. This will be measured through a case study, to be developed by June 2025.

Benefits profile	Benefit 14 - Employee experience with systems and processes, baseline not available. This will be measured through a staff survey, to be developed by June 2025.
Attrition Plan	An Attrition Plan will be developed to manage 'lumpy' attrition i.e. attrition will not fall in line with FTE benefits realisation, so Immigration officers who process a visa product where FTE savings are made but where there is no natural attrition, would need to be reassigned to process visa products currently processed in a different location.
Training & Upskilling Plan	A training plan will be developed with Visa Operations and Learning & Development to ensure that Immigration officers, and others are trained in what might be unfamiliar visa products to ensure continuity and to smooth bumps in attrition.
Programme workstream dependencies	A number of the workstreams within the programme are dependent on one another (for example, the ADEPT product build and decommissioning workstreams). Effective co-ordination and communication between teams is essential to manage these dependencies.
Programme resources	Dependencies on internal resource allocation across the different workstreams must be planned and managed to avoid delays and bottlenecks. The programme is dependent on finding several resources from the external market as well as a reliance on third-party vendors.
Stakeholder support	The programme is dependent on engagement and support from key stakeholders including Ministers, other agencies, customers and staff. Stakeholder approvals and feedback will need to be clearly defined and managed.
Technology integrations	Successful delivery of the programme relies on decommissioning legacy systems and integrating new technologies with existing systems. Dependencies related to technology readiness, compatibility and implementation schedules will require careful planning and co-ordination.
Updates to policy	If small updates to policy or immigration instructions are deemed necessary, these will need agreement from the Minister (with some exceptions for changes to administrative immigration instructions) and may need agreement from other agencies, such as the Ombudsman, Privacy Commissioner, or MFAT. There will also need to be capacity within Policy and Operational Policy to deliver these changes, alongside the existing policy work programme.

11 Business Change Management

Through delivery of the programme, we will see a substantial change to the way we operate. Managing this level of change and complexity requires a well-coordinated, and mature change function to support the transition from the current state operating environment to the new ways of working.

The organisational change will be rolled out in a controlled phased and transition approach through a planned, deliberate and people-centric way. Change will be structured and rolled out as each product is introduced in ADEPT and will be supported with change agents in sites. A transition plan will be created with phased approaches and timings that will be in sync with the roll out of new products onto ADEPT, ensuring learnings are taken from each transition period and refined and adapted for future phased roll outs.

One of the key objectives of our change approach for this programme is to support the successful implementation of programme initiatives and realisation of the expected benefits. To help achieve this and other objectives, a structured organisational change management approach will be developed. This approach will be developed once the programme Change Management specialist role is onboarded.

12 Handover of Benefits Realisation

As part of phase three of the programme there will need to be handover document which will include obtaining sign off from the Benefit Owner that the benefits can be or have been realised. This will occur in phase three and will be developed closer to this stage of the programme.

13 Post Closure Monitoring of Benefits

Given the duration of the programme, the post-closure monitoring progress will be developed in the later phases of the programme, e.g., in phase three.

Appendix A – Benefits Map

Document	Link to Benefits Map
Benefits Map	Internal Link