

**From:** Matt Hoskin - WLG <xxxx.xxxxxx@xxxx.xxxx.xx>

**Sent:** Thursday, 27 April 2023 11:27 am

**To:** Claire Hinton - WLG <xxxxxx.xxxxxx@xxxx.xxxx.xx>

**Subject:** RE: Q&A

Claire,

I've had to dash home for something urgent. Lets talk on Teams as soon as you are able.

I've secured the final member of the group – s9(2)(a)

I thought her perspective would be useful.

I'd also like to talk through the revised email I shared with you and the next steps.

Cheers,

Matt

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**From:** Claire Hinton - WLG <xxxxxx.xxxxxx@xxxx.xxxx.xx>

**Sent:** Thursday, April 27, 2023 9:43 AM

**To:** Matt Hoskin - WLG <xxxx.xxxxxx@xxxx.xxxx.xx>

**Subject:** RE: Q&A

I'm in the office today! East side of L14 at the tall desks – I'm busy this morning but have gaps afternoon

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**From:** Matt Hoskin - WLG <xxxx.xxxxxx@xxxx.xxxx.xx>

**Sent:** Wednesday, 26 April 2023 3:58 pm

**To:** Claire Hinton - WLG <xxxxxx.xxxxxx@xxxx.xxxx.xx>

**Cc:** Stevie Cain - AKL <xxxxxx.xxxxx@xxxx.xxxx.xx>

**Subject:** RE: Q&A

Thanks Claire.

I have a couple of questions/thoughts on the email. I am busy the rest of today but in the office

tomorrow. I'll come and find you to discuss if you are? If not I'll call you. I plan to get this out by tomorrow lunchtime-ish.

Matt

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**From:** Claire Hinton - WLG <[Claire.Hinton@nzte.govt.nz](mailto:Claire.Hinton@nzte.govt.nz)>  
**Sent:** Wednesday, April 26, 2023 3:51 PM  
**To:** Matt Hoskin - WLG <[Matt.Hoskin@nzte.govt.nz](mailto:Matt.Hoskin@nzte.govt.nz)>  
**Cc:** Stevie Cain - AKL <[Stevie.Cain@nzte.govt.nz](mailto:Stevie.Cain@nzte.govt.nz)>  
**Subject:** RE: Q&A

 s9(2)(b)(ii)

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**From:** Matt Hoskin - WLG <[Matt.Hoskin@nzte.govt.nz](mailto:Matt.Hoskin@nzte.govt.nz)>  
**Sent:** Wednesday, 26 April 2023 11:36 am  
**To:** Claire Hinton - WLG <[Claire.Hinton@nzte.govt.nz](mailto:Claire.Hinton@nzte.govt.nz)>  
**Cc:** Stevie Cain - AKL <[Stevie.Cain@nzte.govt.nz](mailto:Stevie.Cain@nzte.govt.nz)>  
**Subject:** RE: Q&A

Claire,

I've got a 5<sup>th</sup> person s9(2)(a)

And yep, I'll send out the email to them, and copy you in and intro you. More than happy not to attend the meetings, unless you want me to.

Matt

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**From:** Claire Hinton - WLG <[Claire.Hinton@nzte.govt.nz](mailto:Claire.Hinton@nzte.govt.nz)>  
**Sent:** Wednesday, April 26, 2023 11:30 AM  
**To:** Matt Hoskin - WLG <[Matt.Hoskin@nzte.govt.nz](mailto:Matt.Hoskin@nzte.govt.nz)>  
**Cc:** Stevie Cain - AKL <[Stevie.Cain@nzte.govt.nz](mailto:Stevie.Cain@nzte.govt.nz)>  
**Subject:** RE: Q&A

Hey Matt,

Awesome – I'll get the email ready.

Do you want to send it out or are you happy for me to reach out directly?

Are you comfortable with not attending the interviews? We will ideally record the sessions and can play back.

Claire

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**From:** Matt Hoskin - WLG <[Matt.Hoskin@nzte.govt.nz](mailto:Matt.Hoskin@nzte.govt.nz)>

**Sent:** Wednesday, 26 April 2023 7:52 am  
**To:** Claire Hinton - WLG <xxxxxx.xxxxxx@xxxx.xxxx.xx >  
**Cc:** Stevie Cain - AKL <xxxxxx.xxxx@xxxx.xxxx.xx >  
**Subject:** RE: Q&A

Claire,

A couple of thoughts from me – in green – below.

So far I have in place:

- s9(2)(a)
- [REDACTED]
- [REDACTED]
- [REDACTED]

I should have another one or two locked in over the next day or so. Ideally get an initial email out to them this week.

Sound ok?

Matt

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**From:** Claire Hinton - WLG <xxxxxx.xxxxxx@xxxx.xxxx.xx >  
**Sent:** Monday, April 24, 2023 4:07 PM  
**To:** Matt Hoskin - WLG <xxxx.xxxxxx@xxxx.xxxx.xx >  
**Cc:** Stevie Cain - AKL <xxxxxx.xxxx@xxxx.xxxx.xx >  
**Subject:** RE: Q&A

Hi Matt,

I'm doing some prep work for the discovery conversations with advisors.

These are the questions we are proposing asking in the initial interviews.

The timelines we are proposing are below.

Ask from you: Do you have the list of potential interviewees in mind yet?

We would plan to use a Calendly page for Advisors to use to sign up to a session.

- Customer recruitment for discovery interviews - this week
- Give two weeks notice for people to sign up
- Interviews during the week 8 - 12 May
- Sense making / insights pack creation / playback session during the week 15 - 19 May

**Initial Advisor discovery: Understand their role and needs**

- How do you typically go about identifying direct investment opportunities for your clients?
- What are some challenges you face when working with clients to identify investment

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opportunities?

- How do you typically interact with businesses seeking investment on behalf of your clients?
- How do you stay up to date on industry trends and changes in regulations? – why are we asking this in relation to LD access? Is this just intel/insight gathering?
- Have you ever used an online tool to connect with businesses seeking investment?
  - If so, can you tell me about your experience?
  - If not, what are some key features or benefits that you would look for in a tool?

And an additional question specific to AIP, ie/ How would this fit into your existing engagement with migrant investors.

Any questions let me know,  
Claire

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**From:** Matt Hoskin - WLG <[xxxx.xxxxxx@xxxx.xxxx.xx](mailto:xxxx.xxxxxx@xxxx.xxxx.xx)>  
**Sent:** Monday, 17 April 2023 9:39 am  
**To:** Claire Hinton - WLG <[xxxxxx.xxxxxx@xxxx.xxxx.xx](mailto:xxxxxx.xxxxxx@xxxx.xxxx.xx)>  
**Subject:** RE: Q&A

No problem. I am in Chch and Akl the rest of the week.

s9(2)(g)(i)

I assume the request would be for 2 or 3 hours of their time over the next 3-4 weeks? One meeting for an initial session/briefing and one for some testing, with a possible third to address any feedback post testing – if needed?

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**From:** Claire Hinton - WLG <[xxxxxx.xxxxxx@xxxx.xxxx.xx](mailto:xxxxxx.xxxxxx@xxxx.xxxx.xx)>  
**Sent:** Monday, April 17, 2023 9:34 AM  
**To:** Matt Hoskin - WLG <[xxxx.xxxxxx@xxxx.xxxx.xx](mailto:xxxx.xxxxxx@xxxx.xxxx.xx)>  
**Subject:** RE: Q&A

I've ended up wfh today, I'll be back in possibly tomorrow, or Wednesday

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**From:** Matt Hoskin - WLG <[xxxx.xxxxxx@xxxx.xxxx.xx](mailto:xxxx.xxxxxx@xxxx.xxxx.xx)>  
**Sent:** Monday, 17 April 2023 9:24 am  
**To:** Claire Hinton - WLG <[xxxxxx.xxxxxx@xxxx.xxxx.xx](mailto:xxxxxx.xxxxxx@xxxx.xxxx.xx)>  
**Subject:** RE: Q&A

Claire,

Where are you located in the office?

I'll pop over and say hi.

Matt

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**From:** Claire Hinton - WLG <[xxxxxx.xxxxxx@xxxx.xxxx.xx](mailto:xxxxxx.xxxxxx@xxxx.xxxx.xx)>  
**Sent:** Monday, April 17, 2023 9:07 AM  
**To:** Matt Hoskin - WLG <[xxxx.xxxxxx@xxxx.xxxx.xx](mailto:xxxx.xxxxxx@xxxx.xxxx.xx)>  
**Subject:** RE: Q&A

Morning Matt, thanks so much for this response – excellent!

Really keen to progress the user group conversation, do you have a few LIA's and Lawyers in mind who we could check in with?

Thanks again,  
Claire

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**From:** Matt Hoskin - WLG <[xxxx.xxxxxx@xxxx.xxxx.xx](mailto:xxxx.xxxxxx@xxxx.xxxx.xx)>  
**Sent:** Monday, 17 April 2023 8:40 am  
**To:** Claire Hinton - WLG <[xxxxxx.xxxxxx@xxxx.xxxx.xx](mailto:xxxxxx.xxxxxx@xxxx.xxxx.xx)>  
**Subject:** Q&A

Claire,

Answers to your questions:

**Who is your target user group (ie/ advisors)? How many of them are there?**

s9(2)(g)(i)  
[Redacted]

s9(2)(g)(i)  
[Redacted]

s9(2)(b)(ii)  
[Redacted]

**What specific problems or needs do they have?**

There are three specific issues that 3<sup>rd</sup> party access solves:

- s9(2)(g)(i)  
[Redacted]

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s9(2)(g)(i)

- s9(2)(g)(i)

- s9(2)(g)(i)

s9(2)(g)(i)

**What is their current solution or workaround for this problem? How do our suggested options compare (Options that were on table: 1. Live Deals access, 2. Live Deals email alerts, 3. Downloadable Live Deals listings)?**

The current workaround would be (i) none, or (ii) using their client's access.

I have spoken to a number of LIAs and lawyers about the problem, and they all agreed that 3<sup>rd</sup> party access – so read or view only – is the right option. I think that LD email alerts is a good idea, from a marketing perspective, though I have no idea how often a new deal appears. I don't think that they need to be able to download listings – that could come later if it becomes obvious that there would be some benefit.

I think the best way of answering this question is to ask a user group.

**What are the key features and benefits this user group (advisors) are seeking?**

Overall, and as above:

- Clarity for their clients – and for themselves
- Enable the proactive marketing of the visa and direct investment opportunities therein
- Transparency from us

**How do they typically discover investment opportunities/the information they need?**

Depends largely on (i) the quality of their commercial networks and (ii) in the case of a partner of a decent sized law firm, the reach of their commercial partners. Also, the degree of connection to us and the ability to engage on specific investment opportunities.

**What channels do they usually come to you through ie/ word of mouth, website**

I have an historic relationship with the majority but the others WOM and/or via events such as webinars/presentations. In the last eight months I've been involved in webinars/presentations to approx. 2000 LIAs and lawyers, which provided a good platform for ongoing engagement. I do think that we should be able to offer LD access as part of our service when an LIA or lawyer approaches us via our generic email. There have been a few of those and I have followed up those inquiries.

Once we have this in place my plan is to deliver an education strategy to the sector. It is a good chance to engage with them all again and I know that LD access will be well received.

**Are there any future trends or changes that could impact this group?**

s9(2)(g)(i)

s9(2)(g)(i)

How might we tailor messaging and positioning to resonate with this specific user group (advisors)?

Probably easiest to discuss this but this is also something I'd talk to a user group about.

s9(2)(g)(i)

Hope that helps. Happy to discuss any part/all of it.

<b>Matt Hoskin</b> Investor Migrant Programme Manager  <b>NEW ZEALAND TRADE &amp; ENTERPRISE</b> Te Taurapa Tūhono	M +s9(2)(a)
	W <a href="http://investnewzealand.nz">investnewzealand.nz</a>
	W <a href="http://nzte.govt.nz">nzte.govt.nz</a>
	Level 15, 100 Willis Street, Wellington <a href="#">View location map</a>
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