Interview Guide

Note: A feedback/response mechanism is currently being developed for documenting responses to the questions below.

Good (morning, afternoon, etc). My name is __________________ from the Internal Revenue Service. I understand that you are the best person in your organization to talk to about electronic filing of federal tax returns. I wonder if I could take a few minutes of your time to ask you a few questions. Your answers will remain confidential and will only be used to help us evaluate our current e-file program to help us come up with ways to make the program better and more attractive to tax professionals such as yourself. If, at any time, you feel uncomfortable answering a question please let me know and we will move on.

Now the first question I have is:

1. How long have you been an electronic return originator?
2. Thinking back to when you first signed up, what was the most compelling reason for your joining the program?
3. Our records indicate that you have a relatively low e-file to total return ratio. To what do you attribute that fact?
4. When you first signed on, what were your expectations of e-file?
5. In what way(s) has the e-file program not met your expectations?
6. Do you offer e-file to your clients routinely, selectively, or provide it only if they specifically request it?
7. How do you currently market or promote e-file?
8. What changes/improvements to the program couldthe IRS make that would encourage you to be more active as an electronic return originator?
9. If the IRS were to offer incentives to tax professionals who increase their e-file to total returns filed ratio, such as a personal IRS contact assigned to you specifically, what incentives would you like to be offered?
10. What can I do personally to help you increase your e-file to total returns filed ratio?

Pre-Visitation Telephone Interview

Once you have gathered the necessary information from the practitioner thank them for their time and praise their tax practice and then ask if you can set up a visit. Explain to them that you would like to discuss the e-file program and chat about several new electronic services IRS has to offer that will enhance their practice.

Those are all the questions I have for now. I really appreciate your taking the time to help me. What I would like to do is take the information you have given me, analyze it, and try to come up with a customized approach for incorporating e-filing both individual and business tax returns into your practice. That should take about a week to ten days. Once I have that, I would like to come by and talk with you face to face and show you what I've come up with.

What would be the best day and time for me to share this information with you?

Telemarketing Call & In-Person Visitation

Each telemarketing call or in-person visitation will be unique and require you to utilize your consultative sales techniques by asking high gain questions and further probing into why the tax professional is reluctant to e-file a larger percentage of his/her tax returns. The responses to the interview questions above will provide you with a foundation to direct the telephone conversation or visit in a personalized manner allowing you to target and provide key messages that will resonate with the tax professional.