

## **IRS SBSE ACS FOCUS GROUP RECRUITING SCREENER**

### *Overview (Welcome)*

Hello, I'm **Mark Rosencranz** from Pacific Marketing Research. Pacific Marketing Research is working with Pacific Consulting Group to assist with the revision of the IRS customer satisfaction survey you recently completed. You had indicated that you were interested in possibly participating in a telephone focus group. Is that still the case?

*If yes, continue.*

*If no, thank and terminate call.*

The research entails participation in a one-hour telephone discussion with a few other taxpayers in September 2007. In exchange for your time, we are offering an honorarium of \$50. The focus group time and dates available are:

Thursday, September 20, 2007 at 12:00 noon Eastern Time, 9:00 a.m. Pacific Time

Thursday, September 20, 2007 at 4:00 p.m. Eastern Time, 1:00 p.m. Pacific

Time Monday, September 24, 2007 at 8:00 p.m. Eastern Time; 5:00 p.m. Pacific Time

Is one of these times convenient for you?

*If yes, please sign the taxpayer up for one time slot and continue with script.*

*If no, please thank and terminate call.*

As we need to balance the groups demographically, Pacific Consulting Group will work in conjunction with Pacific Market Research, Inc. to contact you a week before the call to confirm. Toll-free dial-in information will be provided to you at that time.

*Are you a taxpayer representing yourself? If yes, proceed to next paragraph. If no, ask next question.*

*Are you a tax professional? If yes, thank and terminate the call.*

A professional moderator from Pacific Consulting Group will be facilitating the discussion. Ordinarily, we audiotape the session to save time writing and listening at the same time and we will keep your individual responses confidential, only reporting findings in summary form.

If you would like to verify the authenticity of this request, you may call 202-283-2809 to speak with someone at the IRS.

Thank you for your interest. If you have any questions in the interim, you can reach me at 1-877-271-2300

*Terminate call.*



***SB/SE ACS Survey Review Focus Group***  
**FOCUS GROUP DISCUSSION GUIDE**

*Overview (Welcome)*

Hello, I'm **Kath Giel** from Pacific Consulting Group. Pacific Consulting Group has been hired by the IRS to assist with the revision of the customer satisfaction survey you recently completed. I will be moderating our discussion today. Thank you for participating in this discussion, which will take about one hour. We would like to know your real attitudes and feelings, so please be as open with us as you can. We are recording this session so I don't have to take notes while you talk. We also have some people listening in. We will not be reporting on individual identities; our focus here is on your experiences and opinions.

***Guidelines (Ground Rules)***

- All comments are strictly confidential. We will use first names only, and no names will be used in this report.
- My role as a moderator is to guide discussion.
- The session is tape recorded to allow us to write a comprehensive report.
- The recordings are for note taking purposes.
- I need to hear from all of you, but that doesn't mean that everyone must speak to every issue.
- Please speak clearly and in a loud voice. This ensures that the recorder will pick-up everything accurately.
- Please speak one at a time. I want to hear everything you have to say, and this is difficult to do if many people are speaking at once.
- There are no right or wrong answers. I am here to gather all points of view.
- Please remember everyone has something to contribute based on their experience.
- We will be here approximately 1 hour.
- We ask that you try to limit background noise as much as possible. If you need to mute your line, you can do that.

*Introductions*

Before we get started, let's go around and quickly introduce ourselves and please tell us your first name. At the end of the call I will also ask for a quick role call so that we can ensure that your honorarium is sent to you.

**Topic Discussion**

1. Our records indicate that you all went through the automated collection system process.
  - What were your impressions of the process?
2. I'd now like to talk about some specifics of the process. Let's start with the collection process.
  - **Initial Notice:**
    - What aspects of the initial bill, notice or letter do you recall being particularly effective/not effective?
    - Was the document easy to understand? What was unclear? What questions do you have about the document?
  - **IRS's Automated Answering System**
    - When you think about the automated answering system, what comes to mind?
    - What comments do you have on the ease of understanding the system menu and instructions?
    - What were your perceptions of the time it took to go through the entire process?
    - Did the system get you to the right person? How did that process work?
  - **Time to Resolve Case**
    - When you think about the time aspect of the automated collection process, what comes to mind? In other words, How do you measure the time involved in the automated collection process?
    - What were your perceptions of the time it took to go through the entire process?
    - What did you think about the time you were given to follow up with the IRS?
    - If you did not respond right away, what were the factors causing your delay?
    - After you were contacted, how long did it take to resolve your case? ( month/s, year/s, . > 1year etc).
  - **Right IRS Contact**
    - Did you understand why you were going through this collection process? Were the reasons explained? Why or why not?
    - Were you able to contact the right IRS contact when you had questions/concerns? How did that process work?
    - Once you contacted the IRS, how long did it take to hear back from IRS? Do you feel the IRS responded in a timely fashion? How long did it take the IRS to return your calls or answer your written inquiries?

- How knowledgeable was the IRS employee who dealt with the case issues? Did the responses you received address your concerns?
  - In terms of fairness, how were you treated by the IRS personnel?
  - How would you describe the attitude of the IRS personnel with whom you spoke?
  - Did the IRS representative resolve your issue? If no, why not?
  - How many people at the IRS did you speak to during the call?
- **Information & Communications**
    - What was your perception of the type and amount of information you received about your case? How easy or difficult was it to provide that information?
    - What information was requested of you? (be more specific) It doesn't really matter what was requested. What matters is - how hard it was to get it, what was done after it was submitted, and how timely the case was resolved thereafter.

Taxpayers are often concerned about where they stand with the IRS as their case works its way through the system

- Is that true in your experience?
- Can you describe your experience?
- What types of communication do you see as most helpful/not as helpful? After you submitted the required information, did the IRS keep you informed of the status of your case. What was your expectation for a good exchange of information from a time perspective.

#### **e. Expectations**

The IRS's goal is to meet taxpayer expectations in terms of service i.e. to make it easy to do business with the IRS....

- Specifically, as it relates to length of the collection process – getting the issues resolved, what changes would you want to see?
3. Do you recall completing the interactive voice response survey for the automated collection process with the IRS?
    - Probe
    - What were your impressions of the survey?
    - Is there a better way to solicit feedback in your opinion?
  4. Do you have any other comments or suggestions that you'd like to make?
  5. The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests. The OMB Control Number for this study is 1545-1349. Also, if you have any comments regarding the time estimates associated with this study or suggestions on making this process simpler, please write to the, Internal Revenue Service, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave. NW, Washington, DC 20224.

**Wrap-up**

Those are all the questions that I have. If you'd like to reach me in the future, my name again is Kath Giel and my phone is 650-327-8108. If we could quickly just go around and have everyone state your first name one last time, we will conclude this call. On behalf of both PCG and the IRS, thank you for your time and participation today.