

**IRS SBSE CCE FOCUS GROUP RECRUITING LETTER  
PACIFIC CONSULTING GROUP LETTERHEAD**

FROM: Pacific Consulting Group

SUBJECT: Telephone Focus Group Participation

Dear Taxpayer:

I am requesting your assistance on important research dealing with improving the quality of the Internal Revenue Service (IRS). The purpose of the research is to obtain information to help improve the tax collection process. You are being invited to participate because our records indicated that you received an IRS customer satisfaction survey in 2006 or 2007 regarding a closed tax case. Your participation is voluntary but will be helpful in improving process.

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. If you are interested, please reply by calling Pacific Market Research at [877-271-2300](tel:877-271-2300) or by sending an email to [email@pacificmarketresearch.com](mailto:email@pacificmarketresearch.com) with "IRS CCE Focus Group" in the subject title. You will need to indicate which focus group time and date you are available to participate in:

Wednesday, September 26, 2007 at 12:00 noon Eastern Time, 9:00 a.m. Pacific Time

Wednesday, September 26, 2007 at 4:00 p.m. Eastern Time, 1:00 p.m. Pacific Time

Thursday, September 27, 2007 at 8:00 p.m. Eastern Time; 5:00 p.m. Pacific Time

As we need to balance the groups demographically, Pacific Consulting Group will work in conjunction with Pacific Market Research, Inc. to contact you if you are selected to participate. Toll-free dial-in information will be provided to you at that time.

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.

***SB/SE CCE 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 underwent a compliance center exam process with the IRS.
  - 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 exam process.
  - **Initial Notice:**
    - What aspects of the initial notice do you recall being particularly effective/not effective?
    - Was the letter easy to understand? What was unclear? What questions do you have about the letter?
  
  - **Time to Resolve Case**
    - When you think about the time aspect of the exam, what comes to mind? In other words, How do you measure the time involved in the exam process?
    - What were your perceptions of the time it took to go through the entire process?
    - How quickly did you respond to the initial letter?
    - 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 having an exam? 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?
  
  - **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 did you receive about the adjustments made to your case? How satisfied were you with the information and the way that the information was communicated?
- 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.
- How was the documentation you submitted to the IRS treated?

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 exam process – getting the issues resolved, what changes would you want to see?

3. Do you recall completing the mail survey for the compliance center exam 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.