

# Practitioner Priority Service (PPS) Customer Satisfaction Focus Group

## 2009 Tax Forum Moderator's Guide

### SUPPLIES

- Flipchart Stand
- Flipchart Paper
- Markers
- Name Tents
- Tape Recorder
- Appointment Cards
- Incentive Products for Participants

### OPENING

Welcome to the 2009 Practitioner Priority Service (PPS) Customer Satisfaction Focus Group. My name is \_\_\_\_\_ I am an IRS employee and I will serve as the focus group moderator for today's session. This is \_\_\_\_\_ and \_\_\_\_\_ also IRS employees, they will scribe for us today.

Before we start, by raising your hand, please let know how many of you have ever participated in a focus group.

For those of you who have not, let me explain. A focus group is simply a group discussion with the purpose of obtaining a diversity of views, ideas, and opinions on a particular topic. IRS uses information from focus groups to make decisions on new products and services and ways to improve our current products and services. This purpose of this focus group session is to obtain feedback about the Practitioner Priority Service (PPS).

You'll see me referring to this outline during our session. The outline includes all issues I need to raise with the group, and helps me keep the discussion on track. It is important that we cover all of the issues. Therefore, I may at times have to break off the conversation in order to move on to another area in the guide.

First, we have some ground rules that I would like to go over:

- **No names will be used in the report.** The IRS has arranged this room during this conference for you to speak with us. We only need to know your first name in order to keep the discussion moving.
- **There is no right or wrong answer.** Everyone's opinion is valuable so I'd like everyone to participate if they have information they can share. Please speak one-at-a-time, loudly, and clearly.
- **We will be watching our time and directing our conversation.** Our scribes are taking notes. Because it can be hard to listen to your comments and capture everything, we will also tape this session. The tape will only be used to refresh our memory and to ensure that we convey your ideas and opinions accurately in the report. Once our report is written, the tape is destroyed.
- **We will be here about 1 hour.** There will be no formal break; however, if you need to stretch, go to the restroom, or walk around a little, please feel free to do so but please come back quickly. Your comments are very important to us.
- **I am an employee of IRS, however, I am not a tax expert.** I am unable to assist you with specific tax issues. So please refrain from specific tax issue discussions or questions during this session.
- **Please, no smoking.**

- **Please turn off any cell phones and/or beepers.**

We are required by law to provide to you the OMB control # for this public information request. That number is **1545-1349**.

## **DISCUSSION**

*So tell us a little bit about yourself (profession, hometown, etc.) and why you decided to participate in the Practitioner Priority Service (PPS) Customer Satisfaction Focus Group.*

*Now I'd like to talk about the Practitioner Priority Service. First, I will provide you a brief overview of this service and then we will begin our discussion.*

*The Practitioner Priority Service (PPS) is a toll free, account-related service for all practitioners, nationwide. It is your first point of contact for assistance regarding their clients' account related issues. The toll free service is available to all practitioners (with valid power of attorney declarations) by calling a single toll free number (866-860-4259).*

## **PRACTITIONER PRIORITY SERVICE (PPS) CUSTOMER SATISFACTION QUESTIONS**

1. **Can you give some examples of the reasons you contact PPS?**
  - **Did you find the staff professional, knowledgeable and courteous?**
2. **Did the assistor place you on hold to research a technical issue or to resolve the account before the contact ended?**
3. **Please explain if you were satisfied with the flexibility and authority of the representative to make decisions?**
  - **Are your issues being completely resolved?**
  - **Are your issues are being resolved timely?**
4. **If you previously submitted a POA by mail or electronically, was the assistor able to retrieve the POA information?**
  - **If not, were you required to fax the POA in order to speak to the representatives about your client?**
5. **Were you provided a clear explanation if the representative could not provide you with assistance on a specific account?**
6. **If we were to expand the PPS line to other account related topics, what areas would you like to see added? (e.g. AUR, Exam, etc.)**
7. **Overall, how would you describe your experience when contacting the Practitioners Priority Service (PPS) line?**
8. **What could we be doing better or differently to support your professional needs?**

**CLOSING**

*We are getting close to the end of our time. Before we wrap up our session, I would like to give you the opportunity to add anything else that is on your mind regarding the Practitioner Priority Service.*

*Thank you for taking time out of your schedule to participating in the Practitioner Priority Service (PPS) Customer Satisfaction Focus Group. We appreciate your candidness and will use your responses in our continuing efforts to improve the Practitioner Priority Service. Thank you.*