

## AUR Customer Experience Improvement In-Person Focus Groups

### Recruiting Guide/Screenener

*The list will include taxpayers who have been through the AUR process in the past 18 months. The list should reflect a mix of cases from those who have had W&I AUR experience and those who have had SB/SE AUR experience and a mix of zip codes. Recruit 12 people per group in anticipation that at least 10 will participate.*

Hello, I'm \_\_\_\_\_ and I'm calling from \_\_\_\_\_. We are working with the IRS to conduct a customer satisfaction study. Records indicate that you responded to a survey about the IRS and agreed to be contacted for future studies. Is this correct?

\_\_\_\_\_ Yes (okay even if they say they started the process more than 18 months ago)

\_\_\_\_\_ No *[verify, explain that they do not qualify for group, and thank for their time, then terminate the call]*

This is NOT a call about the outcome of your specific case. Rather, this is your opportunity to discuss the process you went through and what would make it work better. We are setting up a two hour focus group of customers who have been through the IRS compliance exam process.

Your participation in this research is voluntary, but your help on this project would be very much appreciated. As a token of our appreciation for your time, you will receive \$100.00. Are you interested in participating? *[If no, thank customer for their time, and hang up]*

*If respondent is unsure:*

1. During the group, you do not have to answer any questions you do not want to.
2. You will only be identified by your first name.
3. Your answers and comments will be kept confidential.

The focus group will be held on **Monday, May 11, 2009** at **[6:00PM or 8:00PM ET]** at **Focus Suites, One Bala Plaza, Suite 622 Center, 231 St. Asaphs Rd., Bala Cynwyd, PA 19004**. All participants will be asked to participate in a discussion. The discussion will last no more than two hours. You will be joined by a group of about nine other people who, like you, have had experience with the IRS. Would you be able to participate? *[If no, thank them and terminate the call].*

Is anyone in your immediate family an employee of the IRS or any other government organization?

\_\_\_\_\_ Yes *[explain this disqualifies them from the groups, thank, then terminate the call]*

\_\_\_\_\_ No

We are delighted that you will participate in our group. We would like to mail, email, or fax to you some materials about the facility. Where can we send those?

Respondent Name \_\_\_\_\_

Respondent Address

\_\_\_\_\_

Respondent E-Mail Address

\_\_\_\_\_

Respondent Fax

\_\_\_\_\_

We would also like to give you a reminder call on the day of the group. Would we reach you at this number or another? [record number \_\_\_\_\_]

We look forward to talking with you on **Monday, May 11** at **[6:00PM or 8:00PM ET]**. Thank you and have a nice day.

For record keeping:

\_\_\_\_\_ Confirmation letter mailed or faxed

\_\_\_\_\_ Reminder call