

## AUR Customer Experience Improvement Phone Focus Groups

### Recruiting Guide/Screenener

*The list will include taxpayers who have been through the AUR process in the past 12 months. The list should reflect a mix of cases from the seven different categories of project codes and a mix of geographic areas across time zones. Recruit 10 people per group in anticipation that at least 8 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 that correct?

\_\_\_\_\_ Yes (okay even if they say they started the process more than 12 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 one hour focus group by phone of customers who have been through the IRS compliance exam process.

Your participation with 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 \$75.00. 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 private.

The focus group phone call will be held on **Monday, May 4 or Tuesday, May 5, 2009, at 8:00PM ET**. All participants will be asked to participate in a discussion. The discussion will last no more than one hour. You will be joined by a group of about seven other people who, like you, have 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 information (e.g., time, date, call in number). Where can we send that?

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

Respondent Address

\_\_\_\_\_

Respondent E-Mail Address

\_\_\_\_\_

Respondent Fax

\_\_\_\_\_

If there are any problems with the line during the call, at what phone number can we reach you?

\_\_\_\_\_

Here is the information for you to dial-in to the call.

The Dial-In Number for this call is **1-866-606-4717**. A recording will then ask you to provide the conference code which is **4966282#**. The call is being hosted by your moderator at Pacific Consulting Group.

You will be placed on music hold until the call begins.

We look forward to talking with you on **Monday, May 4 or Tuesday, May 5, 2009, at 8:00PM ET**. Thank you and have a nice day.

For record keeping:

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

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