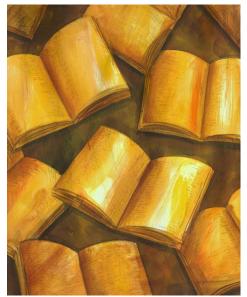# Submission for OMB Clearance

2009 Tax Forum Testing of the Internal Revenue Service (IRS) Telephone System Hold Music

Prepared for the
Office of Management and Budget

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Prepared by the Joint Operations Center

Table of Contents

I. Introduction

Background

For the past ten years, the Internal Revenue Service has received both formal Congressional complaints and informal complaints from customers and practitioners regarding the telephone service on hold music. Past research indicates the on hold telephone music was the primary complaint when customers and practitioners were asked to list their top five complaints within the IRS telephone system, rating it higher than actual wait times. In order to meet the needs of the customer, IRS needs to know more about customer preferences related to on hold music and gain insight into the type of music customers find acceptable.

IRS staff plan to conduct informal one-on-one interviews with tax practitioners during the 2009 Tax Forums, specifically, the Las Vegas Tax Forum on July 7-9, 2009, and the San Diego Tax Forum on July 14-16, 2009. In these one on one interviews, IRS Joint Operations Center staff will ask practitioners to listen to five different types of on hold music and then provide their opinion and preference on the music selections. The expected amount of time per interview is 5-7 minutes. With this information, IRS will be able to improve the usability of the telephone system and the customer experience.

Objectives of Data Collection

The specific objectives of the one-on-one interviews are to determine the following:

- What do customers think of the five different options of on hold music?

- What are customer preferences between five different options of on hold music?

II. Methodology

Who Is Conducting Research
Members of the IRS Joint Operations Center staff will be conducting the one-on-one interviews.

Sample Design
IRS Joint Operations Center staff will conduct one-on-one interviews with as many tax practitioners as possible at both the Las Vegas Tax Forum and the San Diego Tax Forum. Approximately three IRS Joint Operations Center staff members will conduct the interviews in each of the two locations.

Participants will be recruited on site at the Tax Forums by asking tax practitioners if they have a few minutes to participate in a short research study.

Data to Be Collected
The data to be collected is both qualitative and quantitative in nature. IRS Joint Operations Center staff will report any numerical data as well as feedback and impressions noted during the sessions. The data will be compiled from critical questions posed during the one-on-one interviews that are answered by the participants during the one-on-one sessions.

How Data Will Be Used
The data will be used to evaluate potential new changes to the telephone on hold music, improve the phone system, and enhance the overall customer experience.

How Data Will Be Analyzed
IRS Joint Operations Center staff will summarize their notes from each one-on-one interview and identify overall trends including:

- Participant opinions about the on hold music selections; and
- Participant perceptions about the on hold music selections.

Data Collection Date and Location

One-on-one interviews are scheduled to be conducted at the Las Vegas Tax Forum on July 7-9, 2009 and at the San Diego Tax Forum on July 14-16, 2009. Data collection analysis is expected to be completed by August 20, 2009.

Cost of Study

The approximate cost of this study is $9,000. This amount includes the cost for three people to attend each of the two forums as well as money for participant incentive trinkets.

Stipend

Participants will receive a small incentive trinket for participating in the one-on-one interviews.

Recruitment Efforts and Participant Criteria

IRS plans to recruit as many tax professionals as possible at each of the two Tax Forum sites. There are no recruiting requirements besides being a tax professional and agreeing to participate in the one-on-one testing.

Expected Response Rate

IRS expects the response rate to be approximately 70%or greater based on similar past research at the Tax Forums.

Test Structure/Design

Each one-one interview will take no more than 5-7 minutes. Prior to the one-on-one interviews, IRS staff will approach tax practitioners and ask if they are interested in participating in a short research study to improve the telephone system and on hold music. Participants will be offered a small trinket (such as a stress relief ball, pen, etc.) for their participation. In addition, IRS expects to use no additional paper materials.

If a participant does not complete the interview within the time allotted for the one-on-one interviews, we will terminate the session after 10 minutes.

Other Information

IRS will provide the following information to Statistics of Income, Statistical Supper Section within 60 days after the close of the study:

Findings: A brief summary of significant findings evidenced in the results.

Actions taken or lesions learned: A brief summary of any action taken or lessons learned as a result of the findings.

Study information: The number of participant requests, total number of participating participants, dates the data collection began and ended, response rates, actual burden hours and cost of the study.

Contacts

For questions regarding the study, design, or methodology, please contact:

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III. Privacy, Security, Disclosure

We will protect the privacy of the participants in the testing sessions by not using names in our reports. We will also control official access to the information and will oversee public access to the information.

IV. Burden Hours

The estimated time to complete the participant screening is 1 minute and the estimated time for each participant interview session is 7 minutes. We anticipate that approximately 70% of tax practitioners asked to participate will agree to participate. Since we are using a sample of convenience, we do not have a set number of participants we need to recruit. IRS Joint Operations Center staff will keep track of how many participants they ask to participate as well as the actual number of participants that participate.

Estimated number of potential participants screened: 200 individuals
Estimated time to complete screening: 1 minute
Estimated participant screening burden: 3.3 hours (200 x 1/60)

Estimated number of participants: 140 individuals
Time to conduct study: 7 minutes
Estimated participation burden: 16.3 hours (7 x 140/60)

Total Burden (screening and study participation) = 19.63 hours (3.3+ 16.3)