

## IRS – Wage & Investment Research and Analysis (WIRA)

### FOCUS GROUP MODERATOR’S GUIDE TAB Conjoint Update – February 2011

#### Introductions:

- Moderator introduces his/her name and Pacific Consulting Group (PCG).
  - PCG’s involvement with IRS’ historical customer satisfaction studies.
  - Overall project objective to improve/maintain customer service with limited resources
- Explain the purpose of today’s group discussion:
  - To explore which specific service channels taxpayers prefer and why
  - To identify key attributes that drive service channel decisions (tax issue, time elements, personalization, number of contacts to resolution, etc.)
- PCG’s role as a facilitator, not a recommender or tax expert.
  - There are no right or wrong answers; we just want your perceptions, opinions, and suggestions.
- Have respondents introduce themselves and say a few words about their taxes and interactions with the IRS.
  - Do you prepare your own tax returns or use a preparer? (If preparer, what type?)
  - What tax form did you file this year?
  - What IRS services have you used?

#### Taxpayer Service Channel Preference

- Let’s start off by thinking about the situations that have prompted you to contact the IRS directly.

##### *Probes:*

- *Forms and Pubs*
  - *Refund info*
  - *Prior yr return info*
  - *Tax law questions*
  - *Payments or account questions*
  - *Return prep assistance*
  - *Response to IRS notice*
  - *Application for EIN/TIN*
  - *Healthcare Act info*
- Given the tax issues, which IRS service channels have you used? (Tie to tax issue)
    - o Why did you use this channel to deal with this issue?

- Given the tax issues, which non-IRS service channels have you used? (Tie to tax issue)

*Probes:*

- *Tax professional*
- *Tax preparation software*
- *Non-IRS Websites*
- *Books*

- o Why did you use this channel to deal with this issue?

### **Attributes impacting Service Channel Choice**

- Now let's shift the frame to what attributes drive your decision most in determining which service option to use.

- o What key factors drive your decision to use the IRS service channel of choice?

*Probes:*

- *Tax issue*
- *Time elements (wait time, process time)*
- *Personalization*
- *Number of contacts to resolution*
- *Accuracy*
- *Inertia/prior experience*

- o What key factors drive your decision to use the non-IRS service channel of choice?

*Probes:*

- *Tax issue*
- *Time elements (wait time, process time)*
- *Personalization*
- *Number of contacts to resolution*
- *Accuracy*
- *Inertia/prior experience*

### **Wrap-up**

- Is there anything else you wish to add to the discussion?
- Thanks for participating
- The Paperwork Reduction Act required that IRS provide an OMB Control Number on all approved public information requests. That number is OMB XXXX-XXXX. Also, if you like, I can give you a name and address where you can send comments and questions regarding this process or suggestions for making it simpler.

Send your comments and suggestions to:  
Internal Revenue Service  
Tax Product Coordinating Committee  
1111 Constitution Avenue NW  
Washington, DC 20224