

**FOCUS GROUP REMINDER PHONE CALL/LETTER
SAMPLE SCRIPT**

Hi, this is (NAME) from Pacific Market Research calling/writing to remind you about the phone focus group discussion that you've agreed to participate in.

The time for you to participate is [INSERT DATE AND TIME].

Please call 1.866.111.2222 and use passcode 1234567#. We look forward to your participation and hearing your input.

Thank you.

**FOCUS GROUP REMINDER EMAIL
SAMPLE SCRIPT**

FROM: Pacific Consulting Group, on behalf of the IRS

SUBJECT: Focus Group Reminder

This is a friendly reminder that the phone focus group you have agreed to attend is at the following date and time:

[INSERT DATE AND TIME]

Please call 1.866.111.2222 and use passcode 1234567# to access the focus group.

We look forward to your participation and hearing your input.

Sincerely,

Pacific Consulting Group

Moderator Discussion Guide

The objective of this focus group is to understand what the IRS's Correspondence Exam Process is like from the customer's perspective. What we mean by Correspondence Exam is the process you participated in to comply with your financial and filing tax obligations to the IRS. This includes:

1. Understanding the overall customer experience of going through an exam.
2. Understanding the "pain points" in the process that contribute to a customer's feeling dissatisfied with the experience.
3. Understanding from the customer's perspective what we can change to create a positive customer experience for individuals going through the exam process

Introduction: Purpose of discussion, ground rules, disclosures (5 minutes)

1. Not about your case; your cases outcome should not be part of this discussion
2. About your experience specifically around the collection process; not about the filing of your taxes or any other IRS interactions
3. Your participation is completely voluntary. You do not have to answer any questions you do not want to.
4. You may stop participating at any time.
5. Your answers and comments will be kept confidential. Your name will not be used in any report for this project.
6. The focus group will take no more than 2 hours to complete.
7. We are videotaping and audio-taping our session with you, but it is only so that we can review your comments and accurately describe them.

Overall Customer Experience With Correspondence Exam

Overall Exam Process

1. Take a few minutes to write down the sequence of events that have occurred to date regarding your interaction with the IRS on your exam. Write down dates if you remember them, or approximate dates and what type of interaction or event happened. Include events such as letters, phone calls or other interactions whether initiated by the IRS or by you.
2. Share a few of these stories. What were your overall reactions, thoughts and feelings throughout this process?
3. Were there specific interactions, which you remember, more clearly as particularly pleasant? How about interactions that were unpleasant? What were they and why were they pleasant or unpleasant? Please describe a few of those in more detail - what happened; what did you think/feel, what you did next, and what was the result?

Core Exam Customer Experience Phone Focus Groups

Recruiting Guide/Screeners

The list will include taxpayers who have been through the collection process in the past 18 months. Recruit 10-12 people per group in anticipation that at least 8 will participate.

Hello, I'm _____ and I'm calling from Pacific Consulting Group. We are working with the IRS to conduct a customer satisfaction study designed to improve service from the IRS. This is NOT a call about your specific case. This is your opportunity to give input and to make recommendations for change. We are setting up a one and a half hour focus group by phone of customers who have been through the IRS correspondence exam process.

Records indicate that you went through the IRS exam process in the past 18 months

- _____ 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]

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. Are you interested in participating? *[If no, thank customer for their time, and hang up]*

If respondent is unsure:

8. During the group, you do not have to answer any questions you do not want to.
9. You may stop participating at any time.
10. You will only be identified by your first name.
11. Your answers and comments will be kept confidential.

The focus group phone call will be held on (DATES TBD) at (_____ Time in correct time zone). All participants will be asked to participate in a discussion. The discussion will last no more than one and a half hours. 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 **1-866-687-8719**. A recording will then ask you to provide the conference code which is **6999776**. The call is being hosted by your moderator at Pacific Consulting Group.

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

ONLY IF ASKED, READ:

The Paperwork Reduction Act requires that IRS provide an OMB Control Number on all approved public information requests. That number is OMB 1545-1349

Also, if you like, I can give you an address where you can send comments and questions regarding this process or suggestions for making it simpler.

READ ONLY IF RESPONDENT ASKS FOR ADDRESS: Send your comments and suggestions to:

Internal Revenue Service
Tax Products Coordinating Committee
SE:W:CAR:MP:T:T:SP
1111 Constitution Ave. NW
Washington, DC 20224
END OPTIONAL SECTION

ALL READ:

We look forward to talking with you on **[insert Date]** at **[insert time]**. Thank you and have a nice day.

For record keeping:

_____ Confirmation letter mailed or faxed

_____ **Reminder call**

Initiation of the Exam Process

1. What was the starting point of your exam case? How did you realize that your case was in the exam process?
2. Were the exam process and your role in the process clear and easy to understand? How did this affect your exam process?
3. During the exam process, how well informed were you about your case and its status?
 - a. How did you can keep track of where your case was in the exam process?
 - b. How did the exam officer help you keep track of your case
 - c. What is your preferred method(s) for being kept informed about the status of your case? (i.e. letter, phone call, email, postcard, other) *If we have samples of proposed communication methods, ask participants for their thoughts/opinions about them*
4. From the beginning of the exam process until your case was closed
 - a. How many times were you in contact with the IRS during your exam process? Why?
 - b. If there were multiple contacts who initiated the contact?
5. When you had questions about the process, how did you try to get them resolved?
6. During the exam process did you clearly understand what actions you needed to take to complete your exam?
7. Describe the time that you spent on resolving the tax issue. (Note to moderator, “time” is left intentionally ambiguous to mirror question on survey. Moderator probes, describe the: overall length of time from beginning to end of process; time spent on any single part(s) of the process; wait time for response from IRS)
8. If you use an accountant did you use your accountant to work through the exam process with the IRS or did you do it yourself?
 - a. If you used your accountant what did he/she tell you about the progress of your case

Closure of Your Exam Case

1. How did you know that your case had been closed?
 - a. Did you receive a communication?
 - b. Did you call to determine if it had been closed?

Exam Process Timeline

1. What was your expectation on how long your exam process would take to complete?
2. How long did your exam process actually take to complete?
3. What do you think is a reasonable time period for the IRS to complete a case?
 - a. Does the time period differ based on the type/complexity of the case?

Suggestions

1. What could the IRS have done differently to make your exam process a better experience?
 - a. Are there any tools or guidelines that would have made it easier and/or faster for you to provide the information requested by the IRS to close your case?
 - b. How could notices and letters from the IRS regarding your exam issue be made easier to understand?
2. What could you (or any customer) have done to make your exam process a better experience?

Feedback on possible solutions

1. The IRS is considering several changes to the current exam process for customers. These changes would benefit the customer by streamlining the process and/or directly addressing some of your concerns we have been discussing here. I'll briefly describe each of these changes and then ask some questions: *Describe each potential solution.*
2. Would this be a good change to the exam process? Why or why not? How could it be improved?
3. Which of the changes we have discussed would be the best? Why?

Wrap-up

Those are all the questions we have. Is there anything else you would like to say about the exam process before leaving?

Thank you again for your participation in our discussion.

Core Exam Customer Experience In-Person Focus Groups

Recruiting Guide/Screeners

The list will include taxpayers who have been through the collection process in the past 18 months. Recruit 12 people per group in anticipation that at least 10 will participate.

Hello, I'm _____ and I'm from Pacific Consulting Group. We are working with the IRS to conduct a customer satisfaction study designed to improve service from the IRS. This is NOT a call about your specific case. This is your opportunity to give input and to make recommendations for change. We are setting up a two hour focus group of customers who have been through the correspondence exam process.

Records indicate that you went through the exam process in the past 18 months. 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]

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. Are you interested in participating? [If no, thank customer for their time, and hang up]

If respondent is unsure:

12. During the group, you do not have to answer any questions you do not want to.
13. You may stop participating at any time.
14. You will only be identified by your first name.
15. Your answers and comments will be kept confidential.

The focus group will be held on at [INSERT DATE] at [INSERT TIME: 6:00pm or 8:00pm] at [INSERT LOCATION WITH ADDRESS] 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 _____]

ONLY IF ASKED, READ:

The Paperwork Reduction Act requires that IRS provide an OMB Control Number on all approved public information requests. That number is OMB 1545-1349

Also, if you like, I can give you an address where you can send comments and questions regarding this process or suggestions for making it simpler.

READ ONLY IF RESPONDENT ASKS FOR ADDRESS: Send your comments and suggestions to:

Internal Revenue Service
Tax Products Coordinating Committee
SE:W:CAR:MP:T:T:SP
1111 Constitution Ave. NW
Washington, DC 20224
END OPTIONAL SECTION

ALL READ:

We look forward to talking with you on June 12 at **[insert time: 6:00pm or 8:00pm]**. Thank you and have a nice day.

For record keeping:

_____ Confirmation letter mailed or faxed

_____ **Reminder call**