

**DRAFT Relationship Manager Talking Points
W&I SPEC National Partners Focus Groups**

Note to Relationship Manger

One or more of the SPEC National Partners who are assigned to you has been invited by Carol Barnett to participate in an upcoming focus group. The purpose of this focus group is to gather additional feedback on how SPEC can improve its level of service to National Partners. The invitation letter mentioned that you, their SPEC Relationship Manager, would be following up to see if they had any questions about the focus group. A copy of the letter is attached.

We request that you contact each of your National Partners who have been invited (list to be provided separately). The primary purpose for this call is to encourage them to participate, and to answer any questions they might have. You do NOT have to schedule them for the focus group. That will be done in a separate call by Macro International, the firm that will be conducting the focus groups.

Talking Points

When you talk with each National Partner, here is a list of points to make.

Did you receive the letter from Carol Barnett inviting you to participate in a focus group?

- If Yes, encourage their participation.
 - o The benefits to you are the opportunity for your voice to be heard directly, and for SPEC to provide even better service as a result of what we hear.
 - o The focus groups will be conducted by an outside consulting firm, Macro International, to ensure objectivity as well as privacy.
 - o You will be contacted soon by Macro to schedule your participation.

- If No, paraphrase the contents of the letter.
 - o SPEC is committed to continually improving the level of service to all of our National Partner organizations.
 - o We greatly appreciate the feedback you have given us in the past, through the annual customer satisfaction survey and other channels.
 - o We'd like your help in gathering further, more in-depth, feedback.
 - o We plan on holding focus groups with our National Partners in the Washington, DC area.

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- o The focus groups will be conducted by an outside consulting firm, Macro International, to ensure objectivity as well as privacy.
- o This focus group will be held on (date/time) at (location TBD).
- o You will be contacted soon by Macro to schedule your participation.
- o The benefits to you are the opportunity for your voice to be heard directly, and for SPEC to provide even better service as a result of what we hear.

Additional Points

- If they state that they would like to participate, but have a conflict on that particular day and time, say that when they receive their call from Macro, they can discuss alternate times that might work better for them.
- If they have any further questions about the focus groups that you can't answer, ask them to contact (SPEC Contact name) at (phone number.)

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Date

Dear (name of participant)

This is to confirm your participation in the focus group being conducted with SPEC National Partners by Macro International on behalf of the IRS SPEC organization. The focus group will take about one hour, and you will receive a hearty lunch for your time.

The opinions that you express will be most helpful, and we want to assure you that they will remain private.

The focus group is scheduled for:

DATE: (TBD)

TIME: (TBD)

We will be conducting the interview at (TBD).

If you have any questions or you find you are unable to attend, please call us at 301-472-0506. Please arrive 10 minutes before the focus group is scheduled to begin so that we can begin promptly.

We look forward to seeing you then. We will call again the day before the group as a final confirmation.

Very truly yours,

Camellia Bollino
Macro International