Survey of Statistical Information Services Customers

I. Introduction

Overview:
To gauge the level of customer satisfaction with the services provided by the Statistical Information Services (SIS) Office, the Statistics of Income (SOI) Division is performing a survey that will collect information regarding the customers' most recent inquiry. Specifically, SOI will survey customers who either call or email the SIS office, looking for assistance. After assisting the customer with their inquiry, the SIS office will email or fax the survey to customers who agree to participate in the survey. The results of this survey will provide the level of customer satisfaction with products and services provided by SIS. Additionally, it will provide insight as to what SIS and SOI can do to improve their products and services.

Background:
The SIS office is responsible for fielding inquires regarding IRS data; specifically data published by SOI. They receive requests most often by telephone, email, and fax, but are also contacted via letter, as well as walk-in. SIS personnel assist the customer by providing data when possible or try to direct the customer in the right direction.

Objectives:
The SIS office has conducted an annual customer satisfaction survey since 2003. The SIS office would like to gather current customer satisfaction levels to compare to prior years' results. By conducting this survey, the SIS office expects to accomplish the following objectives:

- To measure the level of customer satisfaction concerning services provided to the customer during the most recent inquiry.
- To identify problems that customers encounter when contacting SIS.
- To gain insight on improvements that can be made to products and services.
- To improve the service that SIS provides to their customers, as well as improve the tools and products customers access while searching SOI data.
- To assess improvements / problems by comparing this year's results to prior years'.

This survey will provide valuable information that is not available in any internal IRS data source. From the survey responses, the SIS office will be able to assess the current level of customer satisfaction for the SIS office and draw on customer input to improve our products and services.

II. Survey Methodology

SIS receives data inquires, along with other statistical and IRS questions, from many types of customers through several different means, phone and email being the most frequently used. SIS will begin surveying in January 2009 and will run the survey for 3 complete months.

SIS will ask each customer to participate in the customer satisfaction survey. SIS will conduct a census survey in order to keep the survey timeframe within reason, as well as to make the process easier for its staff.

There is no cost associated with this survey.

We are estimating a 40 percent response rate to the survey. With regard to the low response rate, the IRS will assume that all data collected from this survey is qualitative in nature, and that no critical decisions will be made by SOI solely from the analysis of data from this survey. The results from this survey are simply one piece of a larger set of information needed to assess practitioner/taxpayer needs related to services provided by the IRS.

Based on historical data for January through March, a 40 percent response rate will yield approximately 198 completed surveys. *See **Attachment A** for a copy of the survey.*

The survey will be emailed or faxed to customers who agree to participate. Surveys that are emailed will be embedded within the email for easier completion. However, each email will also include an Excel version of the survey in case the customer cannot use the embedded version. *See **Attachment B** for the instructions that will appear in the embedded survey and the Excel version of the survey.*

Phone customers:
After assisting each phone customer with their inquiry, the staff member will read a script specially written for phone call customers (*see **Attachment C** for a copy of the phone script*). The script explains the basis for

the survey and how the responses will be used. After the explanation, the staff member will explain that in order for the customer to complete the survey, they will need to provide a fax number or email address. Then the staff member will ask the customer if they are willing to participate. Depending on the customer's response, the staff member will either end the call or continue.

Email customers:
Email customers will receive the survey separate from the response to their inquiry. The survey email will contain a survey embedded within it, along with a standard message that explains the purpose of the survey, how the responses will be used, and how to participate (*see **Attachment C** for a copy of the email script*). An electronic version of the survey will also be attached to the email—this version can be used in case the customer cannot view the embedded version, or it can be printed and faxed back to the SIS office.

Following up:
As a reminder to complete the survey, a follow-up email script has been developed. The SIS office plan to send this out to those customers who received the survey as a reminder to return it as soon as possible. This will be sent at the end of every month and each participant will only receive it once. *See **Attachment C** for a copy of the follow-up script.*

Returning surveys:
Included at the top of each survey are instructions on how to return the survey to the SIS office. Participants can either email or fax their completed survey to the SIS office.

III. Privacy

The SIS office will ensure that the utmost scrutiny will be given to privacy, security, and disclosure when surveying its customers. The surveys will not ask for any specific taxpayer information. However, every precaution will be taken to ensure the proper protection of the survey responses and all information obtained will be used only to accomplish stated objectives.

IV. Burden Hours

The estimated time to complete the survey is five minutes, but some variation in the length of time required to answer the survey is expected. Assuming a 40 percent response rate, the total estimated burden is:

Total number of surveyed customers:	495
Estimated number of participants:	198
Time to ask customers to participate:	1 minute
Time to complete survey:	5 minutes
Estimated customer burden:	24 hours, 45 minutes

V. Survey Accomplishments

The following information will be provided within 60 days after the close of the survey data collection operations:

VI. Findings: a brief summary of significant (important) findings that were evidenced in the survey results.
1. Actions taken or lessons learned: a brief summary of any actions taken or lessons learned as a result of the survey findings.
2. Number of requests for taxpayer participation.
3. Number of completed surveys returned by taxpayers.
4. Date the data collection began.
5. Date the data collection ended.
6. Cost: reproduction costs, travel, overtime payments, and any other costs incurred as a direct result of the survey.