

Script to collect potential survey participants e-mail addresses

At the end of service the CSR reads:

In a month, an independent research organization is conducting a short, anonymous, online service improvement survey with our callers. May we include you as a potential survey participant?

If NO read: *Thank you for your consideration*

If YES, read: *That's great. May I have your work e-mail address please?*

[Read e-mail address back to caller to ensure correct capture]

Thank you for helping us to improve our services in the future.

End the call.

'Job tool' for CSRs in case of questions about the survey

Questions from potential respondents (on phone)	Answers to questions
How long will the survey take?	It will take under 10 minutes
Can I give you my home e-mail address?	No, our research vendor is limited to using caller's work e-mail addresses.
What organization will be conducting the survey?	ForsMarsh Group (FMG). You can find them online at forsmarshgroup.com
Will my answers be private?	ForsMarsh Group will <u>not</u> provide any identifying information to the IRS. All answers will be grouped together and no one will be identified by name.
How will the survey be conducted?	You will receive an e-mail inviting you to participate as well as instructions for accessing the online survey.

TSO Online Survey

Q Num	SURVEY TEXT	RESPONSE OPTIONS	NOTES/SKIPS	COMMENTS
inst	Thank you for participating in this voluntary survey. It will take about XX minutes to complete. During this survey you will be asked to rate the service you received when you called the Information Returns (IR) Help Desk on [DATE] regarding a [PRODUCT/Form] for [PROBLEM TYPE/reason] .		3 VARIABLES PRESENT IN SAMPLE FILE to AUTO FILL TEXT FIELDS for EACH RESPONDENT'S SURVEY	1. DATE of CONTACT 2. PRODUCT (Form): 1) Electronic Form 4419 2) Information Returns 3) Electronic Form 4419 4) Form 8809 5) On-line Form 8809 6) Paper Form 8809 3. PROBLEM TYPE (Reason for call): 1) CF/SF 2) Corrections 3) Duplicate File 4) Duplicate File 5) File Format 6) File Format 7) Password/PIN/UserID 8) Queue 9) Software Requirement 10) TCC Problem 11) Test transcript (https://fire.test.irs.gov)
1	Everything considered, rate your overall satisfaction with the service you received from the IR Help Desk on [DATE] .	1) Very dissatisfied 2) Dissatisfied 3) Neither satisfied or dissatisfied 4) Satisfied 5) Very satisfied		
inst	The next questions have to do with locating IR Help Desk assistance			
2	Rate your satisfaction with the ease of locating the IR Help Desk phone number	1) Very dissatisfied 2) Dissatisfied 3) Neither satisfied or dissatisfied 4) Satisfied 5) Very satisfied		
4	Rate your satisfaction with finding the right menu choice for your problem or issue	1) Very dissatisfied 2) Dissatisfied 3) Neither satisfied or dissatisfied 4) Satisfied 5) Very satisfied		
inst	These next few questions have to do with the IRS representative with whom you got information when you call [DATE] . If you received information from more than one representative, please consider the person with whom you had the most contact.			
5	Rate your satisfaction with the courtesy of the representative who handled your inquiry	1) Very dissatisfied 2) Dissatisfied 3) Neither satisfied or dissatisfied 4) Satisfied 5) Very satisfied		
6	Rate your satisfaction with the professionalism of the representative who handled your inquiry	1) Very dissatisfied 2) Dissatisfied 3) Neither satisfied or dissatisfied 4) Satisfied 5) Very satisfied		

7	Rate your satisfaction with the representative's willingness to help you with your issue	1) Very dissatisfied 2) Dissatisfied 3) Neither satisfied or dissatisfied 4) Satisfied 5) Very satisfied		
8	Rate your satisfaction with the knowledge of the representative.	1) Very dissatisfied 2) Dissatisfied 3) Neither satisfied or dissatisfied 4) Satisfied 5) Very satisfied		
9	Rate your satisfaction with the ability of the representative to make decisions regarding your issue.	1) Very dissatisfied 2) Dissatisfied 3) Neither satisfied or dissatisfied 4) Satisfied 5) Very satisfied		
10	Rate your satisfaction with the length of time it took to complete the call from when you first reached a representative.	1) Very dissatisfied 2) Dissatisfied 3) Neither satisfied or dissatisfied 4) Satisfied 5) Very satisfied		
12	What was your professional role for this contact?	1) Sole proprietor 2) Financial institution 3) School/ college 4) Government entities 5) Tax professional/CPA 6) Corporation 7) Partnership 8) Other		
inst	The next few questions have to do with the amount of time you spent on the phone on [DATE] , including time on hold while waiting for a representative, time talking with a representative, and total time on the call.			
13	Did you feel the time you spent on the phone with the representative was too long, too short or about right?	1) Too long 2) Too short 3) About right	If Q13 1, 2 go to Q14	
14	Please tell us why you feel that way.	[open ended]		
15	When you called on [DATE] how long did you wait on the phone before speaking with an IR Help Desk representative?	1) Less than 3 minutes 2) 3 to 10 minutes 3) 11 to 30 minutes 4) 31 minutes or more		
16	In total, how many minutes did you spend on the phone?	1) Less than 10 minutes 2) 10 to 20 minutes 3) 21 to 30 minutes 4) 31 minutes or more		

17	How many people did you speak with when resolving your issue?			
Inst	The next few questions are about the main issue ([PRODUCT/Form] for [PROBLEM TYPE/reason]) you contacted us about on [DATE]			
18	Did you use any of the following methods to resolve your main issue before you called on [DATE]? (choose all that apply)	1) IRS.gov search for FIRE 2) Use FIRE homepage [https://fire.irs.gov] 3) Use Forms or Publications 4) E-mailed the IR Help Desk 5) Called the IR Help Desk	if other methods used go to 22	
19	Including your contact on [DATE] and the 12 months prior, about how many times have you contacted the IR Help Desk about this particular issue?	2 digit fill-in	if greater than 1 then go to q20,	
20	Why did you contact the IR Help Desk multiple times regarding this issue ([PRODUCT/Form] for [PROBLEM TYPE/reason])?	1) I had follow-up questions to ask 2) I was advised to call back 3) I received different answers to my question 4) Other reason/s	for multiple contactors	
21	What could we do to improve?	[open ended]	for multiple contactors	
22	How easy or difficult was it to find the information you needed on IRS.gov?	1) Very difficult 2) Difficult 3) Neither easy nor difficult 4) Easy 5) Very easy		
23	Did the IR Help Desk answer all of your questions on [DATE]?	1) Yes 2) No	if No, go to 25 if Yes, go to 26	
24	What information did you need that the IR Help Desk representative did not provide?	[open ended]		
25	Did the information you received regarding your contact eliminate the need to further calls on this issue?	1) Yes 2) No		
26	Overall, how well did the IR Help Desk meet your expectations during your contact on [DATE]?	1) Much worse than expected 2) Worse than expected 3) As expected 4) Better than expected 5) Much better than expected		
27	Please share how the IR Help Desk can improve so that they would have better met your expectations during your call today.	[open ended]		

	<p>The IRS periodically asks ForsMarsh Group to perform additional research on taxpayer services. Would you be willing to be contacted by ForsMarsh Group to participate in future IRS research such as focus groups and other surveys on taxpayer services? If so, please provide us with your phone number and email address if you have one. Our authority for requesting the information is 5 USC. and 26 USC 7801. The information you provide may be disclosed to an IRS contractor when authorized by law. The contractor is required to follow confidentiality protections required by the Privacy Act and/or Internal Revenue Code section 6103. Research participants may receive a small monetary incentive to participate depending on the research project. Would you like to participate?</p>	<p>Yes, No</p>		
	<p>Please type in phone number:</p>			<p>only if they are willing to participate i</p>
	<p>Please type your e-mail address.</p>	<p>Yes</p>		<p>only if they are willing to participate i</p>
	<p>Please type in your first and last name:</p>			<p>only if they are willing to participate i</p>
<p>That completes the survey; however, we are required by law to report to you the OMB Control Number for this survey. That number is 1545-1432. In addition, if you have any comments about the time used to complete this survey or ways to improve the survey, please mail your comments to the Internal Revenue Service, Tax Products Coordinating Committee, 1111 Constitution Ave., NW, Room 6510-S, Washington DC 20224.</p>				
	<p>Mail your comments to:</p>			
<p>Internal Revenue Service, Tax Products Coordinating Committee, 1111 Constitution Ave., NW, Room 6510-S, Washington DC 20224</p>				
	<p>If you have tried unsuccessfully to resolve a problem with the IRS or if you have a complaint, you may contact the Taxpayer Advocate's office by calling a toll-free telephone number. The toll-free Taxpayer Advocate phone number is 1-877-777-4778.</p>			

E-mail to invite participants to take the survey

[NAME],

We invite you to take part in a brief voluntary survey about your satisfaction with the service you received from the Information Returns (IR) Help Desk by telephone on [DATE]. The survey should take under 10 minutes to complete. Your participation is very important and will help the IRS design products and services that better meet the needs of people like you.

The FORS Marsh Group will not provide any identifying information to the IRS along with your survey responses. We hold your identity private to the extent permitted by law. Please feel confident that your answers will be used solely for the purpose stated above.

- The survey can be accessed at: [URL]
- Your passcode is: [vendor assigned code]

To verify the authenticity of this survey, you may visit <http://www.irs.gov/uac/Customer-Satisfaction-Surveys> for a list of valid and current IRS surveys.

The IRS and FORS Marsh Group, thank you very much for your participation. Your responses will be very helpful for IRS product and service improvement efforts. If you have any comments or questions, please feel free to contact our survey helpline at 1-800-521-7177, or email us at irssurveyhelp@forsmarshgroup.com.

Thank you for sharing your experiences with us.

Sincerely,

Brian Griepentrog
Project Manager
FORS Marsh Group

3-Copy of any follow-up documentation/scripts

E-mail to remind participants to take the survey

[CALLER NAME],

About a week ago we invited you to take part in a brief voluntary survey about your satisfaction with the service you received from the Information Returns (IR) Help Desk by telephone on [DATE].

If you have already taken the survey, we thank you very much for your participation. If you have not, would you take a few minutes and take the survey today? It is short and takes under 10 minutes to complete. Your participation is important and will help the IRS design products and services that better meet the needs of people like you.

The FORS Marsh Group will not provide any identifying information to the IRS along with your survey responses. We hold your identity private to the extent permitted by law. Please feel confident that your answers will be used solely for the purpose stated above.

- The survey can be accessed at: [URL]
- Your passcode is: [vendor assigned code]

To verify the authenticity of this survey, you may visit <http://www.irs.gov/uac/Customer-Satisfaction-Surveys> for a list of valid and current IRS surveys.

The IRS and FORS Marsh Group, thank you very much for your participation. If you have any comments or questions, please feel free to contact our survey helpline at 1-800-521-7177, or email us at irssurveyhelp@forsmarshgroup.com.

Thank you for sharing your experiences with us.

Sincerely,

Brian Griepentrog

Project Manager

FORS Marsh Group