

**IRS Wage and Investment E-help Desk
Phone Focus Group Recruiting Guide/Screening and Reminder
December 2011**

Note: Recruit for 3 groups

INITIAL CALL

Hello, I'm _____ and I'm calling from Pacific Market Research. May I please speak to _____?

You recently participated in an IRS customer satisfaction survey and indicated you would be interested in participating in future research efforts. We are calling to set-up a one-hour focus group phone call to discuss your interaction with the E-help Desk phone service of the Internal Revenue Service. This is NOT a call about your specific case. Participation in the focus group will give you an opportunity to tell the IRS about your service experiences and the group can share their ideas for service improvements.

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 \$50. Are you interested in participating? *[If no, thank taxpayer for their time, and hang up]*

1. Do you primarily call the IRS E-help Desk phone service for help with _____ an e-file question (*go to q2*) _____ or a product or service other than e-file *[Recruit for group 3 – “Other Product Users”. Don't ask Q2]*

2. Do you _____ file electronically 100 or less returns a year *[Recruit for group 1 – “Small Volume Customers”]*

_____ file electronically more than 100 returns a year *[Recruit for group 2 – “Large Volume Customers”]*

IF Small Volume Customer

The focus group will be held via telephone on DAY DATE at (Noon Eastern Time). All participants will call a toll-free 800 number to join the conference call. The discussion will last about one hour. You will be joined by a group of about six people who, like you, recently spoke with the IRS over the phone. You will not be asked about your or your client's specific tax situation, only about your experience with the E-help Desk service interaction. Would you be able to participate? *[If no, thank them and terminate the call].*

IF Large Volume Customer

The focus group will be held via telephone on DAY DATE at (3pm Eastern Time). All participants will call a toll-free 800 number to join the conference call. The discussion will last about one hour. You will be joined by a group of about six people who, like you, recently spoke with the IRS over the phone. You will not be asked about your or your client's specific tax

situation, only about your experience with the E-help Desk service interaction. Would you be able to participate? *[If no, thank them and terminate the call].*

IF Other Product User

The focus group will be held via telephone on DAY DATE at (6pm Eastern Time). All participants will call a toll-free 800 number to join the conference call. The discussion will last about one hour. You will be joined by a group of about six people who, like you, recently spoke with the IRS over the phone. You will not be asked about your or your client's specific tax situation, only about your experience with the E-help Desk service interaction. Would you be able to participate? *[If no, thank them and terminate the call].*

Are you or is anyone in your immediate family an employee of the IRS?

_____ Yes *[explain, thank, then terminate the call]*

_____ No

Where you mandated to e-file?

_____ Yes

_____ No

[Recruiter: note male or female]

_____ Male

_____ Female

We are delighted that you will participate in our group.

The dial in number is: NUMBER

The access code is:

Noon EST: NUMBER

3pm EST: NUMBER

6pm EST: NUMBER

Do you have any questions? We would like some contact information to confirm the meeting and to mail out the token of appreciation for your participation.

Respondent Name _____

Respondent Address _____

We would also like to give you a reminder call on the day of the focus group call. Would we reach you at this number or another? [record number _____]

The Paperwork Reduction Act requires that IRS provide an OMB Control Number on all approved public information requests. That number is OMB 1545-1432. 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 Avenue NW
Washington, DC 20224

Thank you and have a nice day. We look forward to speaking with you on:

DAY DATE at Noon EST

DAY DATE at 3pm EST

DAY DATE at 6pm EST

-----end conversation-----

For record keeping:

_____ Confirmation letter mailed or faxed

_____ Reminder call made

REMINDER CALL

Hello, I'm _____ and I'm calling from _____. This is a call to remind you of your participation in the telephone focus group scheduled for (DAY DATE at TIME). The dial in number is: XXX-XXX-XXXX. The access code is: XXXX#. Do you have any questions? (PAUSE AND ANSWER QUESTIONS). Thank you in advance for your participation.

**IRS W&I E-help Desk
Phone Focus Group Moderator's Guide
December 2011**

(Notes to the moderator are in italics)

Overview

Hello, I'm Jennifer Schranz from Pacific Consulting Group. I will moderate our discussion today. The topic we'll be discussing is your satisfaction with your recent interaction with the IRS E-Help Desk. The overall goal of the research is to provide information that will help the IRS provide better service to customers like you. Your input is very important for establishing the areas of the process that need improvement. This is your opportunity to provide input and to tell the IRS what your experiences have been and to make recommendations for change.

First, I would like to thank all of you for calling in today. Our discussion will take about one hour. I would like to know your real attitudes and feelings, so please be as open and frank with me as you can. I would like for you to think about your opinions of the IRS with regard to your interactions with them and not your opinions regarding tax laws specifically. I am recording this session, and have some IRS personnel listening in, but please keep in mind that our focus here is on your experiences and opinions, not on your individual identities. In fact, none of us know more than your first name.

I also want to point out that I am not an IRS employee and there are no right or wrong answers so please don't hold back any of your perceptions, opinions and suggestions.

Introductions

[Moderator: Gather responses in a roundtable fashion]

To get started, let's introduce ourselves. Please tell us your first name only and what city and state you are located in.

Reasons for Calling the E-help Desk Toll-free service

To get us started today, I'd like to get a bit of background information about the nature of your most recent call to the IRS' E-help Desk toll-free line. *[Moderator: Open Discussion]*

- Briefly, why did you call the E-help Desk?
- How did you know what number to call?
- Did you try to resolve your issue or answer your question any other way prior to calling the E-help service?

Navigation

Next, I'd like to go into detail to understand your experience with various aspects of the E-help Desk toll-free service. *[Moderator: Open Discussion]*

- When you first called the system, did you have difficulty with any part of the automated menu and instructions?
- What difficulties did you have with using the automated menu and instructions?

Probes

*Were there too many menu options?
Were the menu options vague (give examples)?
Were you unable to find the option that met your needs? What option were you seeking?*

- What suggestions do you have for improving the automated menu or instructions?

Staff

[Moderator: Open Discussion]

- I'd like to ask each of you to describe your experience with the customer service representatives you spoke with?
- Was it a positive or negative experience?

Probes

Knowledgeable

Professional

Friendly

Willingness to help

Fairness

Authority

Length of call

Next, we'd like to talk about the length of the call. *[Moderator: Open Discussion]*

- Did the length of call meet your expectations? Why or why not?
- How long did you expect the call to take?
Probes: hold time, wait time, time spent with CSR
- What suggestions do you have to reduce the wait time and overall length of the call?

Issue resolution

We've spoken about the automated system itself, your interactions with the IRS staff, and the length of the call.

- After having gone through this process, did you feel that your issue was resolved? *[tally yes and no responses]*
- For those who felt your issue wasn't resolved, can you explain why not? *[Moderator: Open Discussion]*

Overall satisfaction and comparison to other service organizations

- Overall, how satisfied are each of you with the IRS' E-help Desk toll-free service?
[Moderator: Open Discussion]

Recommendations

- Finally, is there anything you would like to suggest to the IRS about their E-help Desk Toll-free service? *[Moderator: Open Discussion]*
- Any other comments? *[Moderator: Open Discussion]*

Wrap Up

Those are all the questions that I have for this session. I want to thank you and the IRS wants to thank you, for participating in this discussion. PCG will be sending a \$50 token of our appreciation in the mail within two weeks. If, by chance, you do not receive the check in the mail or have any questions about it you can reach me, Jennifer, at 650-327-8108.

Thank you for participating and enjoy the rest of your day. Good bye.