

IRS W&I ACS Phone Phone Focus Group Recruiting Guide

PMR: Please recruit 2 focus groups. Recruit 9 for 6 to show per group.

Hello, I'm _____ and I'm calling from _____. You recently took a phone survey about your interaction with **IRS' Automated Collection System** Toll-free number and indicated that you are interested in follow up research. We are setting up a one-hour phone focus group interview of taxpayers to learn how to improve service to taxpayers like you. This is NOT a call about your specific case. This is your opportunity to provide input about experiences and to make recommendations for change.

First, can you confirm that you completed a survey with IRS' Automated Collection System Toll-free number **within the past 6 months?**

1. Yes (Continue)
2. No (Thank taxpayer for their time and hang up)

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

The focus group will be held via telephone on <DATE> at <TIME>. All participants will call in to an 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, have experience with the **IRS' Automated Collection System** toll-free number. You will not be asked about your specific tax situation, only about your experience with this process. Would you be able to participate? *[If no, thank them and terminate the call].*

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

_____ Yes *[explain, thank, then terminate the call]*
_____ No

2. Please let us know which time works best for you on DATE.
[Recruiter: recruit 9 for each group, mix males and females]

<TIME>

3. *[Recruiter: note male or female]*

_____ Male
_____ Female

We are delighted that you will participate in our group.

The dial in number is: XXXXXXXX

The access code is: XXXX

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 group. 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 1545-1439. 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:

IRS Tax Products Coordinating Committee
1111 Constitution Avenue
Washington, DC 20224

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

<DATE TIME>

Reminder Calls

Hello, I'm _____ calling from _____. This is a reminder that you have agreed to participate in a one-hour phone focus group interview of taxpayers to better understand how to improve service to taxpayers like you.

Your scheduled date and time to dial in is <DATE TIME>

The dial in number is: XXXXXXXX
The access code is: XXXX

Do you have any questions? Thank you and have a nice day.

For record keeping:
_____ Reminder call made

IRS – W&I ACS Customer Satisfaction Study FOCUS GROUP MODERATOR’S GUIDE

Overview

Hello, I’m Elaine Chan from Pacific Consulting Group. I will moderate our discussion today. Our discussion will focus on resolving collection issues. All of you completed an automated phone survey concerning your experiences with the IRS’s service. We observed some interesting findings from this phone survey and would like to understand some of the responses.

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 resolving collection issues.

I am recording this session, and some IRS research personnel, NOT those who work on cases, are listening in, but please keep in mind that my focus here is on your experiences and opinions, not on your individual identities.

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

To get started, let’s introduce ourselves. Please tell us your first name and the city you’re located in. Let’s start with.....*[Moderator: Gather responses in a roundtable fashion]*

Discussion

- First, we’d like to understand what motivated you to respond to the survey? I’d like a response from each of you to this question. Let’s begin with... *[Moderator: Gather responses in a roundtable fashion]*
 - What would have made you not take the survey?
- Next, we’d like some additional feedback to responses we received from the survey. I’ll open this up to the group for open discussion.
- In general, when you answered the survey questions, how well are you able to separate your experience with the automated part of the phone system from any service you received from IRS representatives?
- Describe your experience with length of the call
 - *[Prompt, if the length is too long]* If the IRS cannot make the time required to call shorter, how could they make it better?
- What do you think the IRS can do to reduce the length of calls?

- What do you think the “type of account you called about” means?
- The survey reads, “This question is regarding the type of account you called about. Is the account about...
- An individual who filed a short form (for example a 1040A or 1040EZ with no schedules), press 1
- An individual who filed a long form who is not self-employed, press 2
- An individual who filed a long form who is self-employed, press 3
- A business taxpayer, press 4
- Or an exempt organization, press 5”

Did your situation match one of the categories?

Were these categories clear?

- Did you feel that the phone representative was able to provide the service you needed when you called.
- *[Prompt]* How were they able / not able to do this?
- If the call did not achieve what you had hoped, did the IRS representative explain why they were not able to meet your expectations during the call
- *[Prompt]* What did they say?
- Is there any part of the phone interaction missing from the questionnaire that affects your satisfaction? If so, what is missing that should be included to give a more complete picture of your satisfaction with service provided by ACS staff?
- Do you have any suggestions for how we might improve the survey you take after a call to ACS?
- Finally, what suggestions for how the IRS can improve service to taxpayers like you?

Wrap Up/Thanks

Those are all the questions that I have for this session today. Your feedback has been very helpful. I want to thank you and the IRS wants to thank you for participating in this discussion. You should each receive the honorarium check for \$50 within the next 10 days. If you do not receive your check in 10 days, please call me at 650-327-8108. Thanks and have a nice day.