

**IRS Wage and Investment E-help Desk
Phone Focus Group Moderator's Discussion Guide
2013**

Overview

Hello, I'm Simone Berkowitz from Pacific Consulting Group (PCG) and I'm moderating our discussion today. We'll be discussing your experiences with the IRS E-help Desk. The goal of this research is to provide information that will help the IRS provide better service to customers like you. Your input is very important for identifying aspects of the E-help Desk process that need improvement. This is your opportunity to provide input 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 and results will be presented in summary form and not include any individual's information.

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.

For those of you who are unfamiliar with focus group discussions, a focus group is simply a group discussion with the purpose of obtaining a diversity of views, ideas and opinions on a particular topic. IRS management uses information from focus groups to improve its services.

My job as moderator is to:

- Help guide the flow of the discussion
- Make sure everyone's comments are heard
- Ensure that questions about various aspects of the topic are covered

I am required by law to give you the OMB control # for this public information request. That number is OMB 1545-1349.

In order for things to move along smoothly I have a few ground rules and general information that we need to follow:

- *There are no wrong answers – but there are different points of view. Say what you believe, whether or not anyone else agrees with you. The most important thing about a focus group is the exchange of ideas and opinions.*
- *I'd like everyone to participate, so please speak loudly and one at a time.*
- *Please state your first name as you begin to speak so that everyone can more easily follow the conversation.*
- *You do not need to address all of your comments to me to get them on the table. You can respond directly to what someone else says.*

Introductions

Let's introduce ourselves. As I call each person's first name, please tell us what city and state you are located in.

Reasons for Calling the E-help Desk Toll-free Service and Ease of Locating the Number

I'd like to get a bit of background information about the nature of your calls to the IRS E-help Desk toll-free line.

- How many times have you called the E-help Desk? For how long have you been calling?
- For what reasons have you called the E-help Desk?
- How did you first learn about the E-help Toll-free service?
- Where did you look for the E-help Desk phone number? Where did you expect to find the number? Where did you actually find the number?

Satisfaction

Next I'd like to get some information about your satisfaction with E-help services.

- First, please list all the factors that influence your satisfaction with E-help services. Not how satisfied you are, just what the factors are. *[Moderator: Provide restaurant example if needed. E.g., if you went to a restaurant, factors influencing your satisfaction would be the quality of the food, the ambiance, the speed of service, etc. What are those factors for E-Help?]*
- For those who have been calling E-help for several years, have there been any changes in these factors over the years you've been calling?

Staff /Authority

The next few questions are about the E-help customer service representatives.

- What do you expect from the customer service representative when you call the E-help Desk? What should the representatives have the authority to do? What do they actually have the authority to do?
- In the initial survey you took, you were asked to "Rate your satisfaction with the authority of the assistor to make decisions regarding your issue." What does that question mean to you? *[Moderator: focus on "authority" and probe.]* Would you word that question in a different way to be more clear? Any suggestions?
- How well do the customer service representatives meet your expectations?
- What could the IRS do to improve the performance of the E-help customer service representatives?

Issue resolution

This topic is about issue resolution.

- What other actions did you take or resources did you use to try to resolve your issues besides calling the E-help service? How well did these work for you?
- How could the IRS make the E-help service more effective at issue resolution?

Navigation

Next, I'd like to talk about the automated menu.

- Let's walk through a few scenarios and discuss what options you would select at each point. *[Moderator to play recording of automated menu and pause to allow participants to say which choice they would have selected. Play correct choices and continue until no further options. Select 2-3 scenarios as time permits.]* Do the options make sense? Could any options be improved?
 - Scenario 1: Need help getting registered
 - Scenario 2: Understand reason for rejects
 - Scenario 3: Understand why taxpayer money is being withheld
 - Scenario 4: Correct identifying information
- Please tell me which tasks you have called the E-help line's about *[Moderator: Reference tasks earlier]*
- Describe your overall experience using the automated menu system and which menu options you select.
- What suggestions do you have for improving the automated menu?

Recommendations

- Finally, if you could speak directly to the people at IRS who manage the E-help Desk service, what would you say to them about the services you receive?
- Is there anything (else) you would like to suggest to the IRS about how to improve their E-help Desk service?

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, Simone, at 650-327-8108.

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

**IRS Wage and Investment E-help Desk
Phone Focus Group Recruiting Guide/Screeners and Reminder
July 2013**

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. Your participation is voluntary but your feedback is much appreciated and will help the IRS improve their e-help services. 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. Approximately how many tax returns did you file electronically last year?
 1. 10 or fewer
 2. 11 to 50
 3. 51 to 100
 4. More than 100

2. Do you primarily call the IRS E-help Desk phone service for help with *[Read list]*
 1. E-file of IRS forms (e.g. 1040, 940/941/944, 1120/1041/1065, 720/2290/8849)
 2. e-services
 3. Electronic Federal Tax Payment System
 4. Central Contractor Registration, or
 5. Other (specify)_____

3. Are you or is anyone in your immediate family an employee of the IRS?
 1. Yes *[Thank and terminate the call]*
 2. No

The focus group will be held via telephone on *[Day/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 about five 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]*.

4. *[Recruiter: note male or female]*
 1. Male
 2. Female

We are delighted that you will participate in our group.

The dial in number is: #

The access code is: #

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 1545-1349. 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 *[specify date and time]*

-----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 *[Specify date and 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.