

**Attachments**  
**Approval Request to Conduct Customer Satisfaction Research**  
**W&I CAS Practitioner Priority Service (PPS) Focus Groups Research**

E-mail

**From:** [IRSResearch@icfi.com](mailto:IRSResearch@icfi.com)

**To:**

**Subject:** Seeking Paid Volunteers for a Telephone Focus Group about Tax Topics

Greetings,

ICF International, a research and consulting firm in the Washington, DC area, conducts customer satisfaction research and focus groups for the IRS. The purpose of the focus groups is to hear from tax professionals like you about ways to improve the customer experience when interacting with the IRS.

Our records indicate that during the past year you took part in one of the many customer satisfaction surveys we conduct for the IRS. Near the end of that survey, you provided your name, phone number and email address and said you would be interested in taking part in future research on other IRS-related issues.

Based on your interest, we are pleased to tell you about an opportunity to participate in an upcoming focus group, if you are qualified.

**We are seeking qualified individuals to take part in a telephone focus group we will be conducting on [DATE] from [TIME] Eastern. The focus group will take no more than one hour.**

If you are interested and available to take part in this focus group, please respond to this email by [5 days after email] with the following information:

- Your Name
- Telephone Number
- The best time to reach you (please include your time zone)

We will call you within a few days to ask you a couple of brief questions to see if you qualify for the focus group. We will also answer any questions you may have about the groups.

**If you do qualify and are selected, you will receive a \$50 stipend for your participation.**

On behalf of the IRS, we look forward to hearing from you.

Phone screener:

**W&I PPS CSS Optional Task 9  
Usability Testing of New IVR Survey  
SCREENER**

**Background:**

Screener for Recruiting Tax Professionals for focus groups to gather feedback on the IRS's Practitioner Priority Service (PPS) Toll-Free Number.

**Target Group:**

Tax Practitioners who indicated that they are interested in participating in additional IRS-related research. Recruit from a list of tax professionals who participated in an IRS customer satisfaction survey and who indicated their willingness to participate in future research at the end of the telephone survey and who provided their phone numbers.

**Script:**

**[NOTE TO RECRUITER: IF RESPONDENT ASKS WERE WE GOT THEIR CONTACT INFO FROM TELL THEM: "AT THE END OF A SURVEY WE CONDUCTED FOR THE IRS, YOU WERE GIVEN THE OPTION TO PROVIDE YOUR CONTACT INFORMATION IF YOU WERE INTERESTED IN PARTICIPATING IN FUTURE RESEARCH."]**

Hello, my name is \_\_\_\_\_ from ICF International calling on behalf of the Internal Revenue Service. ICF is a market research firm working with the IRS to help them improve the service they provide to taxpayers and tax professionals like yourself.

**[READ IF FIRST CONTACT]**

We are contacting you today because we are looking for participants in an upcoming study conducted by phone. You indicated in the past that you may be interested in participating in this type of research. There will be a small compensation for your time.

We would like to ask you a couple of brief questions to see if you qualify for the focus group.

**[READ IF EMAIL FOLLOW UP]**

We are contacting you today because you have indicated you are interested in participating in our focus group. We would like to ask you a couple of brief questions to see if you qualify for the focus group.

Q1. Is now a good time to talk?

1 Yes

2 No **[THANK AND TERMINATE]**

Great! Let's get started.

Q2. Have you called the IRS's PPS toll-free line at any time within the past year to ask a question or get information?

- 1 Yes
- 2 No **[THANK AND TERMINATE]**

Q3. Do you feel that you can recall this experience well enough to answer some detailed questions on the process?

- 1 Yes
- 2 No **[THANK AND TERMINATE]**

**[IF RESPONDENT QUALIFIES FOR THE STUDY]**

Great! You qualify for this study.

This focus group will ask for your feedback on the IRS's Practitioner Priority Service (PPS) Toll-Free Number. Your identity will not be shared with the IRS or other agencies. Your participation is voluntary, but your help on this study is very much appreciated.

This study will take about 60 minutes to complete and we will send you VISA \$50.00 gift card for your time. We would like to go ahead and schedule an interview time for you.

**[PROVIDE OPTIONS]:**

- [DATE & TIME 1]
- [DATE & TIME 2]

Can you please provide us with your email address so that we can send you the call-in information and more details about this focus group?

- [CONFIRM EMAIL/RECORD EMAIL]

Thank you, Can you also provide us with your mailing address so we can mail you your \$50 gift card as thanks for your participation in this focus group.

- [RECORD ADDRESS, READ BACK AND CONFIRM ]

Thank you those are all the questions we have for you today. We look forward to speaking with you on (DATE) at (TIME).

Moderator's Guide:

## **IRS PRACTITIONER PRIORITY SERVICE LINE FOCUS GROUP MODERATOR'S GUIDE MODERATOR'S GUIDE: TELEPHONE FOCUS GROUP WITH PROFESSIONALS**

### **Welcome/Introduction**

Welcome and thank you very much for agreeing to participate in this focus group. I'll start out by introducing myself: my name is Rikki Welch and I work for a research company called ICF International, which is located near Washington, D.C.

We've been hired by the IRS, specifically the Wage and Investment Division, to conduct telephone focus groups with tax professionals like you. The purpose is to learn more about how you use the PPS line and gather your opinions around some changes to the line.

I will be your facilitator for the discussion. I will ask you some questions and invite you to give your experiences, thoughts, and opinions. Remember that there are no right or wrong answers, we are most interested in your honest responses and reactions to the questions. That will help the most in any steps that are taken after these focus groups.

Before we begin, I'd like to go over the informed consent and some basic ground rules for our discussion tonight.

### **Informed Consent**

We emailed each of you an Informed Consent form that we asked you to read before today's call. I want to go over the key points on the consent form before we start to make sure you are all are in agreement and are aware of your rights as a research participant. (*Review consent form, emphasizing audio recording, confidentiality, and use of first names only.*)

- Your participation in the group is completely voluntary.
- You may choose not to answer questions that you do not want to answer.
- You may choose to leave the discussion at any time for any reason. I request that you do let me know if you are hanging up.
- We have some observers from the IRS who are listening to our discussion. They have each signed an observer privacy form stating that they will not discuss the identity of participants or what was said by individual participants with others who are not listening to our discussion.
- As thanks for your participation, we will send you a VISA gift card in the mail for \$50. It will be mailed to the address you provided when you registered for this focus group. It should arrive within four weeks; if you have not received it by *(date)* please let us know via email and we will follow up.

Your verbal agreement indicates that you understand the conditions stated above and agree to participate in this discussion group. Is there anyone who does **not** agree with the conditions for this focus group?

## Ground Rules

- A. The reason that we have invited you here tonight is to hear a range of responses and opinions to the questions we're going to be discussing. For that reason, I'd like to ask that everyone actively participate in the discussion.
- B. We will be audiotaping the session. This is to make sure we don't miss anything you're saying.
- C. Please speak loudly, and one at a time—again, this is to make sure we don't miss what one of you is saying because you're talking over one another.
- D. Please do not have side conversations.
- E. There are people from the IRS on the line listening to our discussion. They will have their phones of mute and will not be participating in our conversation.
- F. Everything that is said in this session will be private to the extent allowed by law; your name will never be linked to anything that you say in any future reports.

I'd like to begin by having everyone introduce themselves. Please give your first name (and only first name, please), approximately the last time you called into the PPS line, and the reason you had for calling into the line.

## Purpose of the PPS Line

- In my introduction I said we were going to be talking about the IRS PPS line. Can someone please tell me your understanding of what the PPS line is?
- How about the rest of you? Do you have any details you would like to add to what \_\_\_\_\_ just said?
- What is the purpose of the PPS line?
- What services are available on PPS?

## PPS Line Use

- About how frequently have you used the PPS line in the past year?
- What are the top two reasons you have for calling the PPS line?
- For those of you who called the PPS line last year, how did the speed of receiving an answer this year differ from the speed you received an answer last year?

## Changes in PPS Line Services

- What, if any changes have you noticed this past year in the services offered on the PPS line?  
[Insert examples of changes here]
- For those of you who were aware of the changes, how did you find out about them?
  - Probe: If anyone mentions having found out through a professional organization, ask how many people belong to a professional organization (such as the National

Association of Tax Professionals [NATP], or the National Society of Tax Professionals).

- For all of you (whether you were aware of the changes or not), how would you like to find out about these types of changes?
  - [Probe for IRS.gov]
- Let me give you a breakdown of the service the PPS Line provides **[Insert services]**
  - Because the budget for the IRS is being reduced, some of these services will also need to be reduced. Of the services I just listed, which ones would you say are the most important to you and you would definitely want to keep?
  - [If conversation is not too negative, ask which services are the least important to them and they would recommend be the ones that are cut.]

### **PPS Customer Satisfaction**

Our customer satisfaction surveys show a few areas where PPS callers would like to see improvements. One of those that came out is the *length of time it takes to receive documents from the IRS*.

- What has been your experience with the length of time it takes to receive documents from the IRS?
- Which documents seem to take the longest? Which are the fastest to arrive?

Another area that came out is the *answering agent's lack of knowledge*.

- What has been your experience with the knowledgeability of the people who have assisted you?

The third topic that came out in the customer satisfaction survey is *automated menu useage*.

- How could the IRS improve their automated menu on the PPS line so that you get to where you need to go the first time around, without unwanted transfers?
- Probe: How many of you have experienced unwanted transfers?
  - What you were calling about when those transfers happened?

### **General**

The IRS offers a number of different services through a variety of channels. I'd like to get an idea of how many of you use these different services:

- How many of you on the line subscribe to newsletters from the IRS?
- Which newsletters do you subscribe to?
  - Examples: *Quick Alerts, e-News for Tax Professionals, Qualified Intermediary News, IRS GuideWire*, etc.
- How many of you go to IRS.gov to check for **tax law or policy changes**?

- How frequently would you say you visit IRS.gov?
- How many of you have heard of E-services for transcripts?
  - How many of you use e-services?
  - If you are aware of the product but have never used it, can you please share some reasons you have chosen not to use it?
- PPS was not the only service change IRS made this year-
  - **List of all 6 service changes** –
  - How many of you were aware of these changes?
  - What are your general thoughts on these changes?

### **False Close**

I'm going to take a few minutes to check in with my client to see if there is anything they would like me to follow up on. I'll be back on the line in a few minutes. Feel free to talk amongst yourselves.

### **Closure and Thank You**

I have one last question for you: What, if anything else would you like the IRS to do to improve service to practitioners?

Thank you very much for taking your time to participate in this discussion. Your input has been helpful. Thanks again and have a good day.