

ATTACHMENT A: Sample Study Participation Email

Good Afternoon ____

My name is Marisa McDaniels, and I am a researcher within the Wage & Investment Division of the Internal Revenue Service (IRS). We are currently working on a demand management project that is looking into how other organizations approach and deliver digital services to their customers. We have identified your company/agency as one that offers multiple service channel options to your customers while maintaining high performance levels and providing desirable customer service, and we would like to schedule an informational interview with you.

The overarching objective of the study is to gather data to identify opportunities to facilitate taxpayer awareness, education, and utilization of convenient, effective web-based customer service delivery options that are cost-effective for the IRS.

Below are a few of our questions to help you understand the research and/or identify the appropriate contacts within your organization that may be able to assist us:

- What services are provided to your customers via digital service channels?
- How do you enforce or encourage the use of digital services over traditional channels?
- What strategies were used to identify which services to shift to digital channels?
- Are there any quick hit, or low cost options for digital service channels that you would recommend?

Any advice that you can share with us based on your experience or guidance on whom to contact would be greatly appreciated.

Thank you,

Marisa McDaniels, M.P.H.
Operations Research Analyst
Wage & Investment Strategies and Solutions
Internal Revenue Service
(404) 338-8210

Paperwork Reduction Act Notice

The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests. The OMB Control Number for this study is #1545-1349. Also, if you have any comments regarding the time estimates associated with this study or suggestions on making this process simpler, please write to the: Internal Revenue Service, Special Services Section, SE:W:CAR:MP:T:M:S, 1111 Constitution Ave. NW, IR-6129, Washington, DC 20224.

ATTACHMENT B: Interview Guide

Hello, my name is _____ and I am a researcher with the Internal Revenue Service. Thank you for agreeing to participate in our interview today. The IRS is identifying opportunities for providing digital service channels to taxpayers, thus reducing our phone and paper contacts. We are looking to identify several long term as well as short term high impact opportunities for change that will drive taxpayer traffic and paper correspondence to lower cost web-based channels. Any advice that you can share with us based on your experience is greatly appreciated and will be used to inform our approach. Please be assured that the information you provide will not be shared outside of this research effort.

Disclosures (5 Minutes)

Ok, let's cover a couple things before we get started.

1. **Privacy.** Everything that you say here will be kept strictly private to the extent allowed by law. Your comments will not be linked to you personally. Your name and other personally identifiable information will be removed from any reports created using the information discussed and you will not be associated with any particular comment or statement. There are no right or wrong answers, and your comments and opinions will only be used in combination with the feedback that we get from other people.
2. **Voluntary Participation.** Your participation in this session is entirely voluntary. You do not have to answer any questions that you do not wish to answer but please keep in mind, there are no wrong answers.
3. **Observers.** There may be some people from my research team who will listen in and take some notes. Your candid feedback will be very valuable, so even though people are listening, please speak openly about your opinions and experience. We want to learn from you, so it is important that you share your honest opinions.
4. **Time.** I will be watching our time and directing our conversation. Our discussion is scheduled for about 60 minutes, but it may not take the full hour. A formal break has not been scheduled but if you need to stretch, go to the restroom, or walk around a little, feel free but please come back quickly.
5. **OMB.** By law, I am required to report to you the OMB (Office of Management and Budget) Control Number for this public information request. That number is 1545-1349. In addition, if you have any comments about the time estimate associated with this study or suggestions on making this process simpler, you may write to the IRS. Would you like the address?

[If yes]

Internal Revenue Service, Special Services Section, SE:W:CAR:MP:T:M:S, 1111 Constitution Ave.
NW, Room 6129, Washington, DC 20224

6. **Thank You.** Thank you for participating in today's session. We appreciate your time and your contributions.

Any questions so far?

Let's get started. I am going to ask you some questions about your organizations structure, the service channels you all provide, how you approached demand management and your shift towards utilizing a more digital service environment.

Services and Channels Provided

- 1) What services are provided to your customers via digital service channels?
- 2) What types of service options are still provided via traditional channels (phone/paper)?
- 3) Were you able to fully transition any service options completely to the digital environment?

Approach to Demand Management

- 4) What strategies were used to identify which services to shift to digital channels?

Innovative Solutions for Digital Service Options

- 5) What types of customer service applications are used on mobile devices specifically?
- 6) Have you utilized text messaging for customer service purposes? If so, how?
- 7) What real-time service options exist for your customers? (Ex. Online chat, etc.)
- 8) Are you addressing any customer service needs via social media or other innovate outlets?
- 9) How have your customers reacted to mobile, text, real-time and/or social media service options?

Strategies for Potential Pitfalls in the Digital Service Environment

- 10) What steps have you taken to address data security issues?
- 11) How have you balanced the needs of low income and/or elderly populations with the shift to digital service options?
- 12) What other obstacles/limitations have you experienced with the move to a digital service environment? Are there any pitfalls that come to mind that we should avoid?

Marketing and Change Management Efforts

- 13) How do you enforce or encourage the use of digital services over traditional channels?
- 14) How have you minimized resistance from your staff and customers in reaction to the move to a digital service environment?
- 15) What marketing channels have been helpful in spreading the word about digital service options?

IT/Systems in the Digital Service Environment

- 16) What tools or products did you utilize to build out digital service channels?
- 17) Are there any quick hit, or low cost options for digital service channels that you would recommend?

Thank you so much for your time today! The information you provided will be very helpful in determining our demand management strategy. Please do not hesitate to contact me if you think of anything else you would like to add or if you have any questions. Enjoy the rest of your day!

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