

Moderator's Guide: Nationwide Tax Forum 2019

1:1 Interviews

Tax Forum Locations

Interview duration: 30 min

Setup Needed: Laptop, internet connection, timer

Frame Up Session - 5 mins

Thank you so much for coming in today. I wanted to give you a little information about what you will be looking at and give you time to ask any questions you might have before we get started. The purpose of today's session is to talk to you about some new IRS digital communication tools and walk you through a prototype. We are independent researchers and did not create this prototype, so please be as candid as possible when providing feedback.

But before we start, let's go over some ground rules.

- **Privacy** Everything that you say here will be kept strictly private. We will use first names only and names will not be used in any report so please feel free to tell me what you think.
- **Voluntary Participation** Your participation today 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.
- **Time** I will be watching our time and directing our conversation. We will be here for about 30 minutes. A formal break has not been scheduled but if you need to stretch, go to the restroom, or walk around a little, feel free to do so but please come back quickly. Your comments and participation are very important to us.
- **Recording** I'll be taking notes throughout our session but I'll also be recording to ensure we capture all of your feedback. The recording will include audio only.
- **Thanks** Thank you again for participating in today's session. We appreciate your time and your feedback today.

Do you have any questions before we get started?

Demographic Questions – 3 mins

What type of tax professional are you?

- CPA
- Enrolled Agent
- Reporting Agent
- Return Preparer
- Attorney
- Software Developer
- Other: _____

How many years have you been working in this field?

- Less than 1
- 1 – 10
- 11 – 20
- More than 20

Overview: Digital Communication Tools - 20 mins

Now I'd like to walk you through a prototype.

[Use chat video (5 mins) for refresher in testing sessions]

Initial Impressions Chat (Objectives & Demand)

- What are your first impressions?
- What do you like about it?
- What don't you like about it?
- Do you think this would be useful for you? For your colleagues? For taxpayers?
- What would you most likely use chat for?
- Do you have an idea for where this type of support might work best?
- When released, that chat feature will be available on payments and collection pages. Which pages would you like to include it on? What are your top 3 pages?
- Which additional features would you like to this feature have?
- Would the ability to include attachments be helpful?
- Any additional comment that you would like to add?

Feature 1: Authentication

- What did you think about the authentication process?
- As you can see in this demo, we have you start unauthenticated, then can go into authenticated chat mode if needed. What were your impressions of this transition? Was there anything confusing about it?
- What circumstances might require your customers to authenticate?
- Is the IRS log in (authentication process) something you regularly get feedback on? What kind of feedback have you received?

Feature 2: Print Summary

This button would allow you to print a summary of the chat session.

- Is this a feature you would find useful?
 - o If yes:

- When might you use the feature?
 - How frequently would you use it?
 - If the IRS does not include this feature, how would you get a summary?
- o If no:
- What are the primary reasons you wouldn't use this feature?

Feature 3: Feedback

- If you put yourself in the shoes of the taxpayer, would you feel like your issue was resolved? Why/why not?
- Would using this feature eliminate your need (or your client's need) to have to call in to the IRS?

Magic Wand Question

- If you had the ability to create any tool or service to better serve taxpayers, what would it be?
- Any additional comments that you would like to add?

Closing (2 min)

- Thank you for your time! Do you have any feedback for me?
- Ask participant if they are willing to participate in future research studies to provide their contact info/business card. (e.g., "We are regularly speaking with people about this subject and others like it to improve the tax experience for citizens. Would you be willing to speak with us again to inform future products and services?")