

## 2019 IRS Taxpayer Experience Survey

### Focus Group Moderator Guide

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#### **Welcome and Introductions (5 min)**

Hello everyone. My name is \_\_\_\_\_ and I will be leading today's discussion. I work for ICF, a U.S. management consulting firm located just outside of Washington, D.C. We have been asked to speak with you today by the Internal Revenue Service or IRS as you likely know them. First, I want to let everyone know that I'm not an IRS employee, and I am not a tax expert. I am here to help guide the discussion as a focus group moderator and ensure we get through the questions we have to cover today. I want to hear your honest opinions about the topics we will discuss. There are no right answers to the questions I'm going to ask. Please relax, share your opinions and enjoy the discussion.

#### **Ground Rules**

Before we begin, I'd like to review some ground rules for today's discussion. Ground rules are our guidelines for operating so that we can complete our task in a manner that is respectful of everyone and provides all of you with the opportunity to express your thoughts safely and confidentially.

- The OMB Control Number for this study is **1545-2274**. If you have any comments concerning the time estimates associated with this study or how to make this process simpler, we will provide an address to you at the completion of our discussion.
- Everything you say will be kept private to the extent allowed by law. We will use first names only, and names will not be used in any report.
- Your participation in this session is entirely voluntary. You have been invited here to offer your views and opinions, so everyone's participation is important. 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.
- It's okay to be critical. I want to hear your views and opinions about whether you like or dislike something. You do not have to reach a consensus, but please be respectful of each other's opinions.
- This session will be audio recorded. This allows us to capture everything that is being said today. We will include a summary of this discussion, and potentially some quotes as well, in a report to our client. However, we will not tie your name to anything specific you say.
- There are a few other people listening into the discussion. Some are coworkers of mine listening in to take notes. Others are from the IRS and are simply listening to hear things first hand before the report comes out; they have all signed an observer confidentiality agreement.
- You may excuse yourself from the conversation at any time for any reason.
- Please speak one at a time.
- Because we're on the phone, I ask that you say your first name before speaking so I know who is speaking. I may call on those I haven't heard from in a while.

Are there any questions before we get started?

## **Icebreaker**

To get us started, let's introduce ourselves, say where you're calling from, and briefly tell me about one of your hobbies or something you like to do for fun.

## **Experience with IRS Communication Channels (5 min)**

We're here today because the IRS wants to know more about your experiences interacting with the IRS. As we go through the discussion, I will frequently ask you about different channels you have used to make contact, interact with, or obtain information from the IRS. This could be interacting with an IRS employee in person at an IRS office or over the phone via the IRS toll-free line, sending the IRS an e-mail or a letter, or it could be a method like visiting the IRS website (IRS.gov) or the IRS app (IRS2Go).

1. Let's start by talking about the different communication channels the IRS currently offers. After each, I'll ask which you are familiar with, even if you have never used it before.
  - a. IRS website, IRS.gov, Virtual Service Delivery, or authentication website
  - b. IRS toll-free phone line
  - c. Visiting a local IRS office Taxpayer Assistance Center or walk-in center
  - d. Sending regular mail to the IRS
  - e. E-mailing the IRS
  - f. IRS mobile phone app, IRS2Go
  - g. Videos on IRS's YouTube channel
  - h. Posts on IRS's social media pages, Facebook, Tumblr and Twitter
2. Which of the channels would be the easiest to use? Why?
  - a. Which of the channels would be the hardest to use? Why?
3. Which of the channels I just mentioned are you surprised the IRS offers?
  - a. Now that you know about them, are you likely to use them?
    - i. Why or why not?

## **Using the First IRS Communication Channel (10 min)**

4. Now let's talk about different channels you've used in the past to make contact with the IRS. Specifically, I want you to think of a recent experience when you've needed to contact the IRS to get an answer to a question or get some assistance with an issue, and you ended up contacting the IRS through more than one channel. Maybe you needed help to find a tax form or calculator, submit a tax return or amended return, or respond to a notice you received from the IRS. In particular, if you could, please think of a time when you reached out to the IRS through two, or more, different channels. What was the issue you needed help with, and what was the channel that you used *first*?
  - a. Why was this the channel you used first?
    - i. For example, have you used this channel successfully in the past? Did you use a channel you were most familiar with, such as a website or phone line? Did you select it because you thought it would be easy to use? Was the channel you would have wanted to use not available?
  - b. Did you have any concerns about using this channel first?
    - i. [IF CHANNEL WAS NOTED AS BEING HARD TO USE] Why did you select this channel, even though it would be hard to use?
5. What was your experience like, using this channel first?
  - a. How easy was it to access the channel?
  - b. What went well?
  - c. What did not go well?
  - d. What about this channel could be improved?

- e. How successful were you in getting the information or assistance you were looking for?
6. [IF TIME ALLOWS] To what extent might the channel you use first to contact the IRS vary depending on why you were contacting them?
  7. As you were getting information or assistance in the first channel, was there a suggestion to use another channel or channels in order to address your issue?
    - a. What do you remember about that suggestion?
    - b. To what extent was this suggestion helpful or unhelpful?
    - c. If you did not get a suggestion, would you have wanted one? Why?

**Using the Second IRS Communication Channel (10 min)**

8. Did you try to get help through a second channel?
  - a. [IF YES] What about your experience using the first channel made you seek help from a second channel?
  - b. [IF NO] Did anything about your experience using the first channel make you not want help from a second channel?
9. What was the channel that you used *second*?
  - a. Why was this the channel you used second?
  - b. Did you have any concerns about using this channel second?
    - i. [IF CHANNEL WAS NOTED AS BEING HARD TO USE] Why did you select this channel, even though it would be hard to use?
  - c. How easy or difficult was it to move between channels?
  - d. How much time passed between accessing different channels?
  - e. If you did not use a second channel, which one might you have used? Which channel might you use in the future? Why that channel?
10. What was your experience like, using this channel second?
  - a. How easy was it to access the channel?
  - b. What went well?
  - c. What did not go well?
  - d. What about this channel could be improved?
  - e. How successful were you in getting the information you were looking for?
  - f. For those who didn't use a second channel, does the description of this experience make you wish you had used one?
11. [IF TIME ALLOWS] To what extent might the channel you used second to contact the IRS vary depending on why you are contacting them?
12. Again, was there a suggestion to use any other channel or channels in order to address your issue?
  - a. What do you remember about that suggestion?
  - b. To what extent was this suggestion helpful or unhelpful?
  - c. If you did not get a suggestion, would you have wanted one? Why?

**Using Additional IRS Communication Channels (5 min)**

13. What about your experience using the second channel made you seek out any other channels?
14. What other channels did you use?
  - a. Why did you use these other channels?

- b. Did the order make a difference?
  - c. Did you have any concerns about using any of these channels?
  - d. How easy or difficult was it to move between channels?
  - e. How much time passed between accessing different channels?
  - f. [IF DID NOT USE ANY OTHER] Did you consider accessing any other channels? Which ones? What prevented you from accessing them?
15. What was your experience like, using these other channels?
- a. How easy was it to access the channels?
  - b. What went well?
  - c. What did not go well?
  - d. What about any of these channels could be improved?

### **Getting Information to Resolve the Issue (10 min)**

16. Ultimately, did you get the information you were looking for?
- a. Which channel provided the best experience? What made it the best?
17. Overall, how easy or difficult was it to navigate between different channels?
18. Overall, how helpful was it to access different channels?
- a. Did you learn different things in different channels?
  - b. If you did not access more than one channel, do you now wish you had? Why?
19. How would you rate your overall experience getting the information you were looking for? Would you rate it as: Excellent, Good, Poor, or Unsatisfactory?
- a. Why would you give your experience that rating?

### **Further Improvements to the Experience (10 min)**

20. What else about your experience accessing different channels that we didn't talk about could be improved?
21. Thinking back on your issues, if you could have accessed any other source of info, or any channel, what would it have been?
- a. What would you have expected to find in this channel?
22. Next time you need information, would you use the same channel(s)?
- a. Would you try them in the same order?
23. [IF TIME ALLOWS] Next time you need information, where would you prefer to get the information you need?
24. What could the IRS do to make you more comfortable with using any of the channels?
- a. [IF NEEDED] What could the IRS do to make you more comfortable with using the IRS website, IRS.gov?
  - b. [IF NEEDED] What could the IRS do to make you more comfortable with using the IRS mobile phone app, IRS2Go?

### **False Close (5 min)**

*Tell participants that you are going to speak with observers to see whether they have any follow-up questions. Check email for questions you need to follow-up on.*

### **Closing**

This concludes today's session. On behalf of the IRS, I wish to thank all of you for your participation today. As I mentioned at the beginning:

*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 1545-2274. This survey will take around 63 minutes to complete. All responses are confidential.* 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, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave. NW, Washington, DC 20224.

Before we go, is there anything else anyone would like to add?

Thanks again!