

## 2019 IRS Customer Call Back Recruiters/Moderators Guide

### Customer Call Back Focus Group

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#### **Welcome and Introductions**

Hello everyone. My name is \_\_\_\_\_ and I will be your moderator for this discussion. I work for ICF, a market research 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. Right away, 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 today. I want to hear your honest opinions about the topics we will discuss today. There are no wrong answers to the questions I'm going to ask. Please just relax 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. Please do not disclose any personal information.

- The OMB Control Number for this study is 1545-2274. If you have any comments concerning the time estimates associated with this study or on how to make this process simpler, we will provide this address to you at the completion of our discussion.
- Everything that you say will be kept private to the extent allowed by law. We will use first names only during our discussion and names will not be used in any report. Please feel free to tell me what you think.
- 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. You may excuse yourself from the conversation at any time for any reason.
- 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. Please speak one at a time.
- This session will be recorded. This allows us to capture everything that is being said today, and we will include the information in a report to our client. However, we will not tie your name to anything specific you say today.
- There are people who are listening into the discussion. Some are coworkers of mine listening in to take notes on the discussion. 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.
- 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.

#### **General Understanding**

We're here today because the IRS wants to know more about your experiences with their call-back feature. Customer call-back technology offers a percentage of taxpayers calling the IRS service line the option to leave a call-back number, disconnect from the call queue, and receive a call-back during a

range of time. Customer Callback technology has been an established industry practice for private and government call centers to improve the customer experience. The process initiates when a customer reaches their task-specific queue AND when the wait time is over 20 minutes AND when there is a place in the call-back virtual queue to accommodate them. It is automated and the invitation occurs after 1-2 minutes in queue when the pre-conditions are met. The call-back itself involves an automated system calling the customer and placing them at the front of the relevant queue when they answer.

Are there any questions before we get started?

To get us started, let's simply introduce ourselves, tell us what state you are calling from, and a hobby or something you do for fun.

[Participants introduce themselves]

1. **[RESPOND ALL]** Let's start by talking about calling the IRS in general and in what capacity or role? Let's go around our virtual room for this one...
  - a. How often do you call the IRS?
  - b. With your most recent call to the IRS, tell me if you called as a taxpayer, tax professional, someone who represented a taxpayer, or something else.
2. Before you used the call-back feature provided by the IRS, were you aware that this kind of feature existed?
  - a. Have you had any prior experiences with a call-back when contacting other private companies and government agencies? If yes, how did that experience compare with your IRS call-back experience?
  - b. What made your IRS call-back experience better, worse, or the same as other experiences?
3. When you called the IRS about your particular issue, approximately how long did you wait before you were offered a call-back from the IRS?
  - a. Did you consider this wait time before you were offered a call-back to be about right, too long, or too short?
4. What do you remember about the actual customer call-back communication?
  - a. I have a recording of the call-back communication. I am going to play it for you, and then ask you a few questions about it. *[Play recording]*
    - i. Was the message clear? If no, why not?
    - ii. Was it easy to follow? If no, why not?
    - iii. Was there anything about it you think could be improved?
5. About how long was your scheduled call-back wait time set for?
  - a. Did you consider this wait time for the call-back to be about right, too long, or too short?
  - b. Would you have wanted to be able to set the call-back time?
6. **[RESPOND ALL]** Did you receive a call-back in the promised call-back time?
  - a. If no:
    - i. What did you do?
      1. Did you wait for the call, or try to call-back in?

- ii. How long did it take to receive callback?
  - iii. To what extent was it an inconvenience to not get the call when you expected it?
- 7. Did you accept the call on the first attempt?
  - a. If yes: Did you experience any difficulty in accepting the call? Was there anything that could be improved about it?
  - b. If no:
    - i. Why were you unable to accept the first time?
    - ii. Are there any changes that could be made that would have helped you to accept the call on the first attempt?
    - iii. Did you receive another attempted call-back?
    - iv. Did you experience any difficulty in accepting the second call? Was there anything that could be improved about it?
- 8. Did you experience any difficulties being routed to a Customer Service Representative when you were called back?
  - a. What difficulties did you experience?
  - b. What changes, if any, could improve the experience of being routed to a Customer Service Representative when you were called back?
- 9. How long were you on hold after call-back before the Customer Service Representative came on the line?
  - a. Did you consider this wait time to be about right, too long, or too short?
  - b. What, if anything, could make this experience better?
- 10. Was the particular issue you called about resolved to your satisfaction?
  - a. If yes: Good to know. What else about the experience could still be improved?
  - b. If no: Could the call-back process be improved in a way that might have led to resolution?
- 11. **[RESPOND ALL]** How would you rate your overall call-back experience? Would you rate it as: Excellent, Good, Poor, or Unsatisfactory?
  - a. Why would you give your experience that rating?
- 12. To what extent was your experience getting a call-back an improvement over your previous experience calling the IRS?
  - a. What about your call-back experience was an improvement?
  - b. What about your call-back experience wasn't an improvement?
- 13. What else about the call-back experience that we didn't talk about could be improved?

**False Close**

*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. You will receive your gift code by email within the next week. 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 session will take around 63-65 minutes to complete. All responses are voluntary and confidential. Also, if you have any comments regarding the time estimates associated with this study or suggestions on making this process simpler, please let us know and we can email you the address to write to:*

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

Thanks again!