

**Moderator Guide for
TM103XX NTF21 Improving the Taxpayer Experience
Focus Groups**

Hi! My name is _____ and I'm a focus group moderator from the Internal Revenue Service. My co-moderators are _____ and _____, and they will be taking notes during our conversation.

We are seeking information to improve the taxpayer experience. The Taxpayer First Act requires IRS to develop a thorough strategy for customer service and the taxpayer experience has been reimagined with long-term goals in place. Over the next 10 years, the IRS will improve taxpayer experiences by expanding digital services, seamlessly guiding taxpayers to available resources, and proactively educating the taxpayer community. In addition, the IRS aims to establish an interactive network of partnerships, focus strategies to better assist underserved communities, and utilize advanced analytics of enterprise data to better understand the customer needs. We are collecting feedback to help the IRS achieve these long-term goals of the Taxpayer First Act.

For those of you who may not have participated in a focus group before, a focus group is a research tool used to gather ideas and opinions from a group of individuals with a common characteristic or experience by means of directed discussion. The common experience today is that everyone here should be working with taxpayers directly.

(Note to Moderator: If someone does NOT have the appropriate experience, thank them and politely have them leave.)

Before we start, I need to go over several administrative items and some ground rules:

- Administrative items
 1. The written summary created from this session will NOT use any names nor reflect any personal information that could be traced to you.
 2. We ask you to respect others privacy and not share what is discussed today.
 3. As a standard practice and for the protection of your privacy, a Privacy & Civil Liberties Impact Assessment (PCLIA) has been submitted and approved for this project.
 4. The Paperwork Reduction Act requires that the IRS display Office of Management and Budget (OMB) control number on all public information requests. The OMB Control Number for this focus group is 1545-1349. Participation in this focus group is voluntary, and we estimate the length of the session will be one hour.

My job as the moderator is to help guide the flow of conversation, make sure everyone's comments are heard, and ensure the list of specific questions are covered in our session together. A few ground rules and then we'll get started:

- Ground Rules
 - Please silence any background noise and cell phones.
 - Everyone's opinion is valuable, so I'd like everyone to participate.
 - There are no right or wrong answers. Please speak up if you have a different point of view.

- o Whenever you speak, please state your name, then your response; we only need to know your first name during our discussion today.

- Does anyone have any questions?

Warm Up

Let's begin!

Please tell us your first name only, how long you have been preparing returns and is your client base mostly business or individual returns?

- a) [Note to moderator]: Go around the phone [round-robin] for warm up.

Part A: Introduction

- 1) What images come to mind when you think of the IRS?
- 2) What barriers have you encountered when dealing with the IRS?
 - Probe: What barriers have you encountered when trying to file your clients' returns?
 - Probe: What barriers have your clients encountered when dealing directly with the IRS?
- 3) What are your thoughts on the IRS as an employer?

Part B: Communication and Digital Services

- 4) What are your top 3 reasons for contacting the IRS?
- 5) In your experience, which contact methods are typically the most effective for reaching the IRS?
 - Probe: What are your preferred methods for communicating with the IRS?
 - Probe: Phone – Single call resolution? Wait time (try website?)
 - Probe: Correspondence – Communication clear? Timely?
 - Probe: Website – Ease of use? Find what you need?
- 6) What are your biggest challenges when communicating with the IRS?
 - ASK: Which contact methods are the most difficult to use, least responsive or least helpful?
- 7) What tools would better assist you in communicating with the IRS?
- 8) Which of the current digital/online services are the most useful?
 - Probe: Which do your clients most commonly use?
- 9) What kinds of digital services should be added to better assist your clients?
 - Probe: What services should be added to help practitioners?

Part C: Education and Resources

- 10) On which 3 topics do your clients need additional education from the IRS?
 - Probe: Which subjects do you find are most difficult for your clients to understand?
- 11) How can we better reach your clients to provide education and resources?

ASK: Which method of delivery is preferred by your clients? Online? In person?

12) How would you prefer to receive educational services from IRS?

ASK: Which method of delivery?

13) Tell us about your experiences with IRS non-tax social benefit services? (Stimulus checks, ACA, EIP, etc?)

ASK: Where do you go for information about IRS non-tax social benefit services?

14) Which IRS resources do you feel are most beneficial to your clients?

Probe: Which resources are most used by your clients?

15) Are there any resources that you feel your clients need better access to?

Part D: Suggestions for Improvement

16) How can the IRS better recruit new employees?

17) How can we improve the IRS image/perception?

18) What resources could greatly improve the taxpayer experience and should be added?

19) How can the IRS make taxpayers more aware of the resources available to them?

Probe: Are there any programs that should be promoted and advertised more by the IRS?

Part E: Conclusion

20) Are there any additional comments about the topics we covered today?

Before we conclude, I would like to check with my co-moderator to see if they need any information clarified.

Thank you for sharing your thoughts and opinions today. Your participation and feedback are extremely valuable and will provide the IRS with information to consider. Have a great day!