

2024

IRS

*Taxpayer Interview
Call center Experience*

Moderator Guide –

Prepared By
**Taxpayer Experience Office &
Transformation and Strategy
Office**
Internal Revenue Service

Background (5 minutes)

Hello, my name is _____ and I would like to thank you for your time and volunteering to participate in this discussion today. To give you some background on the purpose of this interview, we are a team from Deloitte Consulting conducting this session on behalf of the IRS Transformation and Strategy Office, (TSO) and Taxpayer Experience Office, (TXO).

You have been chosen for today's session because you have contacted the IRS Call Center within the last 120 days. Today's session will be about 30 minutes and is about the IRS Call Centers and how we can improve your experience as a taxpayer to get the answers you need more efficiently. This discussion is to hear from YOU about your experience, however we do have a list of questions that we will use to guide our discussion.

Before we get started, there's a few things I want to go over.

- As advised in the questionnaire we sent out, we would like to record audio of our session today to better capture your comments for our research. Your feedback will not be used for anything other than our research, and the recording will be deleted once the research summary is completed. Are you ok with us taking an audio recording of today's session?
- This is an informal discussion, so there are no "right" or "wrong" answers - we're simply looking for your honest reactions.
- These conversations are intended to focus on your experience with the IRS Call Center. However, we may touch upon interactions you had with the IRS before or after calling the IRS such as utilizing the IRS website.
- 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.
- 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 discussion group is 1545-2256, and participation is voluntary.
- In addition, if you have any comments about this session, you may write to the IRS at: Internal Revenue Service, Special Services Committee, SE: W:CAR:MP:T:M:S - Room 6129, 1111 Constitution Avenue, NW, Washington, DC 20224.

Just a reminder, we have a list of questions we hope to cover, if we go off topic or we are running short of time, we may have to shift the discussion to be sure we get through everything.

Do you have any questions before we proceed? Feel free to interrupt me at any point if you have questions, concerns, or need clarity.

[Note: The sub-bulleted questions will be asked based as needed based on the taxpayer's response to the main question]

Introductions / Pre-Call Interactions (9 minutes)

- To start, can you please share what prompted you to call the IRS call center?
 - *If they mention letters:* What was the content the content of the letter? How clear did you find the communication and next steps? What information could have been more helpful?
 - *If they mention self-service:* Do you have an online account and have you ever used it? Did you use it before you called the IRS call center? Did the agent alert you to your online account?
- o What did you do to try to resolve this issue before you called?
 - Did you use a web-based application (such as Where's My Refund or IRS.gov) before deciding to contact the call center? What was that experience like?
- o How easy was it to find the number to call? How did you know what was the correct number to call? Do you remember which number you called?
- o How many times did you have to call before you got to an agent?
- o How many times have you called the IRS about this issue before?

IVR Navigation (4 minutes)

- Can you describe your experience navigating the automated phone system before connecting to an agent?
 - o What issues, if any, did you experience when navigating the automated system? Did you get stuck in a loop in the automated system or were you able to connect with a representative easily?
 - o Were you able to navigate the automated system by speaking your number selection or did you have to use the phone dial to select your option?
 - o Were you offered a callback/hold your place in line option? Did you take advantage of this? Were you called back?

- o How long were you on hold before you reached a representative?
- o What could have made reaching a representative easier?
- o Did you have voice recognition technology available to capture the reason for your call and your personal information and was it successful with capturing this data?

Call Transfers (4 minutes)

- Once you reached a representative, were you in the correct department or did you need to be transferred?
 - o What expectations were set about your call transfer (the reason, offer the correct department's information if you need to call back)?
 - o How many times were you transferred until you reached the right representative?
 - o When transferred, did you have to authenticate with the first representative before being transferred? Did you have to re-authenticate yourself with the new representative?

Representative Interaction (4 minutes)

- Describe your interaction with the call representative.
 - o How did the representative greet you? What information were you first presented with?
 - o What was the authentication process with the representative? How easy was it you validate that you were who you said you were?
 - o Was the representative aware of the reason for your call before you explained?
 - o Was the representative able to easily understand the reason for your call and provide clear, concise next steps for resolution?
 - o How confident and efficient was the representative in answering your questions?
 - o Had you called about this inquiry previously? If so, was the representative aware of your previous call history? Were they able to easily continue where the previous representative left off or did you need to explain the reason you were calling again?

- Did the representative give you all the information you needed to solve your issue?
 - Were there any issues with the information you received? Was the information incorrect or missing any details? How did you learn this?
- What would have made your interaction with the representative better?

Hold Time (4 minutes)

- Were you placed on hold? What was your experience on hold time?
 - Did the representative explain why they were putting you on hold and how long it would take?
 - How appropriate did you find the length of hold time based on your inquiry?
 - How many times were you placed on hold during the call?

Call Wrap (4 minutes)

- Did you feel like you had your issue fully resolved? Or did you have to call back to resolve your issue?
- How did the representative wrap up the call?
 - What kind of additional assistance did the representative offer?
 - Did the representative refer you to self-service tools available, like [irs.gov](https://www.irs.gov), to help you with future issues?
 - What call summary were you given at the end of your call? Were you offered an after-call survey?

Wrap Up (55 mins elapsed; 5 minutes)

We have just a little time left, is there anything else you would like to share about your experience calling the IRS?

Thank you for your feedback - it really does help us improve the IRS Call Center. The Transformation and Strategy Office (TSO) and Taxpayer Experience Office (TXO) will continue getting feedback from additional taxpayers as work on this process continues.

Moderator's Guide - Elective Pay

May we contact you in the future using the email you provided to see whether you might be interested in participating in additional user research? Do you have any questions for us? Thanks again and have a good day!