CCB <u>Revised</u> IVR Survey Final Script

<u>*Qualifications for Callback*</u>

1. It is determined through the ICM scripting if the caller qualifies for a callback *(i.e. Application, EWT… etc.)* and based on the percent set by the business whether they will be offered a survey.
2. Upon acceptance of the callback, and the returned call, the agent is notified on their screen whether or not to Offer Survey.
   a. <u>The existing customer service survey takes precedence over the Customer Callback survey.</u>
   b. <u>If the caller is transferred from the original application for the callback, they will no longer qualify for the survey.</u>

<u>*Recruitment*</u>

1. Agent receives notification on their screen to Offer Survey.
2. Agent offers survey to the caller "This call has been randomly selected to take a survey about IRS customer service. It will take about four minutes. Would you be willing to participate in this survey?"
3. If caller response is "Yes", the agent will transfer them to survey.

<u>*Questionnaire*</u>

4. **The survey preamble will then begin:**
   *Thank you for agreeing to take the IRS Customer Callback Survey. 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 <u>**1545-1432**</u>. 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, Special Services, SE:W:CAR:MP:T:M:SP, 1111 Constitution Ave. NW, Room 6129, Washington, DC 20224.*

5. **Caller will then be prompted with the following:**
   Using your telephone keypad, please answer the following questions [begins with Q1 below].

6. If the caller does not respond or the response is invalid, after two tries, move the caller on to the next question.

Q1 – Regarding your experience today with your scheduled callback, how satisfied are you with our automated callback service?

   1. Very Dissatisfied, 2. Dissatisfied, 3. Neutral, 4. Satisfied, 5. Very Satisfied

   [If 1. Very Dissatisfied., 2. Dissatisfied,. Or 3. Neutral, then Q1a, if 4. Satisfied or 5. Very Satisfied., then Q2]

Q1a – Based on your last response, please select from the following option that best describes how we did not meet your expectations?

   1. I did not receive the callback within the time stated
   2. I was not transferred to a representative within a reasonable time
   3. I was not able to select a preferred time for a callback
   4. I was hesitant to answer the call based on the caller ID
   5. Some other reason

Q2 – What is the longest period of time you would be willing to wait for a call back from the IRS?

    1. Less than 30 minutes, 2. 30 minutes to an hour, 3. More than one hour up to 90 minutes,
       4. More than 90 minutes

Q3 – If you have caller ID, what description appeared when you received the callback from the IRS?

    1. "IRS", 2. A warning about SPAM, 3. Martinsburg, 4. Other, 5. I don't have caller ID

Q4 – If offered, would you use IRS Customer Callback again?

    1. Yes, 2. No, 3. Undecided

    [If 1. Yes., then Q5 If 2. No., or 3. Undecided., then Q4a]

Q4a – Which reason best describes why you would not use Customer Callback again?

    1. Inconvenient to wait on hold, 2. I may not be in a secure place to complete authentication,
       3. Don't want the call back to possibly interrupt time with a client, 4. Some other reason

Q5– If possible, would you like the ability to schedule the time of your callback from the IRS?

    1. Yes, 2. No, 3. Undecided

7. The call will then conclude with.

Thank you for completing the Customer Callback Survey...Goodbye