

CFI GROUP
2023 Small Business & Self-Employed Division (SBSE) Survey
Department of Treasury: Internal Revenue Service

(These questions will be reformatted for a web survey in the pending 2023 contract)

Hello, I'm _____ with Dynata, a market research firm, calling on behalf of CFI Group. We would like to ask you about your experiences with the services you received from the Internal Revenue Service. The purpose of the research is to help the IRS improve its services to consumers like you. Your answers will remain anonymous, and your participation is voluntary. You may stop at any time or skip any question you do not wish to answer.

Your opinions are important because you have been chosen randomly to represent consumers across the United States and your responses will be added to a growing IRS database of evaluations of customer satisfaction to improve the products and services provided to you, the consumer.

The authority for requesting the information is 5 USC 301. The primary purpose of collecting this information is to improve IRS customer service. IRS may disclose information to a contractor when authorized by applicable law in order to analyze and administer the survey. Providing the information is voluntary. If you do not provide all or part of the information requested, the IRS will not be able to use information that might have been provided to improve service to you.

QMON. This call may be monitored or recorded for quality assurance purposes.

PROG. NOTE: Do not wait for an answer, continue with the survey unless the respondent says otherwise.

Monitoring Refusal Text: Unfortunately, I am unable to continue with the survey without your consent to have this call monitored or recorded. Thank you for your time.

May I speak with _____?

If listed person is not available, read the question below.

QA. May I speak to the person, or one of the persons, who has the most interaction with the IRS concerning the filing of your IRS corporate income tax return?

- 1 Yes, person available
- 2 Yes, but not available now (Schedule callback)
- 3 No, you cannot speak to the person

- 4 Do not interact with the IRS
 - 5 Yes, speaking to correct person
 - DK
 - REF
-

{IF QA=3-4 OR DK OR REF, GO TO TERMINATE SCREEN; OTHERWISE CONTINUE}

(If person is available, reread intro if necessary and go to intro before Q1. If person is not available, schedule callback)

Thank you for being willing to participate in this important survey. We will call back at a later time.

PROG. NOTE: TERMINATE SCREEN

Unfortunately, based on your responses, you do not qualify to continue with the survey. Thank you for your time and interest in taking this survey.

QAGE. For statistical purposes only, are you 18 years old or older?

- Yes
 - No (Terminate)
-

QPRA [QPRA IS READ TO ALL RESPONDENTS INCLUDING TERMINATES AND REFUSALS.]

The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests along with the address where you can send comments regarding the study. You are not required to respond unless a currently valid OMB approval number is displayed. The OMB number for this study is 1545-1432. If you have any comments regarding this study, please write to:

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

We estimated the time required to be 20 minutes.

Now, I am going to ask you some questions about the IRS process for filing your **2022** IRS corporate income tax return...

Q1. Before your most recent interaction with the IRS, you probably knew something about the IRS tax filing process for small businesses and the self-employed. Now think back and remember your expectations of the

overall quality of the IRS tax filing process. Please give me a rating on a 10-point scale on which "1" means your expectations were "not very high" and "10" means your expectations were "very high."

How would you rate your expectations of the overall quality of the IRS tax filing process for small businesses and the self-employed?

[RECORD NUMBER 1-10]

DK

REF

The IRS provides information to help your company meet its federal tax obligations. The information provided includes written materials (forms, publications, etc.), phone assistance, email assistance, and Internet sites. Thinking about information you receive...

- Q2. How difficult or easy was it to obtain information to meet your company's federal tax obligations? Again, we will use a 10-point scale on which "1" now means "very difficult" and "10" means "very easy." How difficult or easy was it to get information?

[RECORD NUMBER 1-10]

DK

REF

- Q3. How clear and understandable was the information on meeting your company's federal tax obligations? Using a 10-point scale on which "1" means "not very clear and understandable" and "10" means "very clear and understandable," how clear and understandable was the information?

[RECORD NUMBER 1-10]

DK

REF

- Q4. How useful was the information on meeting your company's federal tax obligations? Using a 10-point scale on which "1" means "not very useful" and "10" means "very useful," how useful was the information?

[RECORD NUMBER 1-10]

DK

REF

Business firms may have various interactions with the IRS. Some can be routine, including filing your company's federal income tax forms, paying any taxes owed, receiving funds, and ensuring that the IRS has the correct information. Now, thinking about these kinds of routine interactions ...

- Q5. How difficult or easy were your routine interactions with the IRS? Using a 10-point scale on which "1" means "very difficult" and "10" means "very easy," how difficult or easy were your routine interactions with the IRS?

[RECORD NUMBER 1-10]
DK
REF

- Q6. How reliable was the IRS during your company's routine interactions? Using a 10-point scale on which "1" means "not at all reliable" and "10" means "very reliable," how reliable was the IRS during your company's routine interactions?

[RECORD NUMBER 1-10]
DK
REF

- Q7. How responsive was the IRS during your company's routine interactions? Using a 10-point scale on which "1" means "not at all responsive" and "10" means "very responsive," how responsive was the IRS during your company's routine interactions?

[RECORD NUMBER 1-10]
DK
REF

And thinking about IRS personnel with whom you had contact during your routine interactions with the IRS...

- Q8. How courteous were personnel with whom you had contact? Using a 10-point scale on which "1" means "not at all courteous" and "10" means "very courteous," how courteous were the personnel?

[RECORD NUMBER 1-10]

11 Did not have contact with the IRS
DK
REF

{IF Q8 = 11, GO TO Q10; OTHERWISE CONTINUE}

Q9. How professional were personnel in terms of being helpful, responsive, and knowledgeable? Using a 10-point scale on which "1" means "not at all professional" and "10" means "very professional," how professional were the personnel?

[RECORD NUMBER 1-10]
DK
REF

Q10. Please consider all your experiences in the past two years with the Internal Revenue Service process for filing your corporate income tax return. Using a 10-point scale, on which "1" means "not very high" and "10" means "very high," how would you rate the overall quality of the IRS process for filing your corporate income tax return?

[RECORD NUMBER 1-10]
DK
REF

Satisfaction includes many things. Let's move on and talk about your overall satisfaction with the IRS process for filing your corporate income tax return.

Q11. First, please consider all your experiences to date with the IRS process for filing your corporate income tax return. Using a 10-point scale on which "1" means "very dissatisfied" and 10 means "very satisfied," how satisfied are you with the IRS process?

[RECORD NUMBER 1-10]
DK
REF

Q12. Considering all of your expectations, to what extent has the IRS process for filing your corporate income tax return fallen short of or exceeded your expectations? Using a 10-point scale on which "1" now means "falls short of your expectations" and "10" means "exceeds your expectations," to

what extent has the IRS process for filing your corporate income tax return fallen short of or exceeded your expectations?

[RECORD NUMBER 1-10]

DK
REF

Q13. Forget the current IRS process for filing your corporate income tax return for a moment. Now, I want you to imagine an ideal process for filing your corporate income taxes. (PAUSE) How well do you think the IRS process compares with that ideal process? Please use a 10-point scale on which "1" means "not very close to the ideal," and "10" means "very close to the ideal."

[RECORD NUMBER 1-10]

DK
REF

Next, I want you to think about any communication you may have had with the IRS over the past two years regarding complaints about your experience with the process of filing a corporate income tax return...

Q14. Have you complained to the IRS within the past two years about the process of filing your corporate income tax return?

1 Yes
2 No
DK
REF

{IF Q14 = 1, ASK Q14A-Q14B; OTHERWISE GO TO Q15}

Q14A. How well, or poorly, was your most recent complaint handled? Using a 10-point scale on which "1" means "handled very poorly" and "10" means "handled very well," how would you rate the handling of your complaint?

[RECORD NUMBER 1-10]

DK
REF

Q14B. How difficult or easy was it to make your most recent complaint? Using a 10-point scale on which "1" means "very difficult" and "10" means "very easy," how difficult or easy was it to make a complaint?

[RECORD NUMBER 1-10]

DK

REF

The IRS mission is to "provide America's taxpayers top quality service by helping them understand and meet their tax responsibilities and enforce the law with integrity and fairness to all."

Q15. How confident are you that the IRS will do a good job in the future administering the tax process for small businesses and the self-employed fairly? Please use a 10-point scale on which "1" means "not at all confident" and "10" means "very confident."

[RECORD NUMBER 1-10]

DK

REF

Q16. How willing are you to rely on the IRS to do a good job administering the tax filing process for small businesses and the self-employed? Please use a 10-point scale on which "1" means "not at all willing" and "10" means "very willing."

[RECORD NUMBER 1-10]

DK

REF

Now, we need to ask a few demographic questions about your company.

IRS1. Which of the following best describes you? (READ CODES 1-7)

- 1 President or COO
- 2 In-house tax counsel
- 3 External tax accountant or attorney
- 4 Corporate Treasurer or CFO
- 5 Manager
- 6 Accountant

- 7 Bookkeeper
 - 8 Other (Specify)
 - DK
 - REF
-

IRS2. Approximately how long has your company been incorporated? (ASK AS OPEN END)

- 1 1-3 years
 - 2 4-6 years
 - 3 7-10 years
 - 4 Over 10 years
 - 5 Not incorporated
 - DK
 - REF
-

IRS3. How many people does your company employ? Please include all locations. (ASK AS OPEN END)

- 1 1-49
 - 2 50-149
 - 3 150-499
 - 4 500-999
 - 5 1,000 or more
 - DK
 - REF
-

IRS4. Has your company been subject to an IRS audit or delinquent collection action within the past two years?

- 1 Yes
 - 2 No
 - DK
 - REF
-

IRS5. Has your company or its representatives used any of the following IRS services within the past two years? (READ CODES 1-7; ACCEPT UP TO EIGHT MENTIONS)

- 1 Toll-free telephone contact
 - 2 Main IRS website
 - 3 Small Business and Self-Employed community website
 - 4 IRS Small Business workshops or presentations
 - 5 Face to face contact with an IRS representative
 - 6 Tax Topics website
 - 7 IRS Chat Bot
 - 8 Other (Specify)
 - 9 None of the above
- DK
REF
-

IRS6. Which of the following payments does your company make using the IRS Electronic Tax Payment System (EFTPS)? (READ CODES 1-5; ACCEPT UP TO FIVE MENTIONS)

- 1 Employer's Annual Federal Unemployment Tax (FUTA) return or payment
 - 2 Employer's Quarterly Federal Tax return or payment
 - 3 Quarterly Federal Excise return or payment
 - 4 Annual return or payment of withheld Federal Income Tax
 - 5 U.S. Corporation Income Tax payment
 - 6 None of the above
- DK
REF
-

IRS7a. OMITTED

IRS7. - OMITTED

PROG. NOTE: THANK

Those are all the questions I have for you. Thank you for your time and valuable opinions!