Taxpayer Experience Strategy Talking Points for Stakeholders

The taxpayer experience is the cornerstone of the IRS mission. It encompasses every taxpayer interaction, whether it's visiting IRS.gov for more information, calling the toll-free line with a question or meeting with a revenue agent during an exam. The IRS' Taxpayer Experience Strategy puts taxpayers first and addresses their service expectations, while ensuring fairness and compliance with the tax law.

The strategy is designed to meet the needs of all types of taxpayers and other stakeholders who rely on the IRS for information and services. Reflecting both near-term and long-term goals, the Taxpayer Experience Strategy focuses on six areas:

- **Expanded Digital Services** will provide improved self-service digital channels by expanding individual online accounts and introducing online accounts for tax professionals and business taxpayers.
- **Seamless Experience** will integrate digital tools with other service channels to help taxpayers navigate the IRS and resolve issues through their preferred communication channel.
- **Proactive Outreach and Education** will educate taxpayers by providing information at the time, in the language, and using the method they prefer.
- **Community of Partners** will build on our longstanding and successful partnerships and develop new ones to create a network that finds new ways to reach taxpayers, improve service and reduce burden.
- **Focused Strategies for Reaching Underserved Communities** will combine existing IRS efforts and involve our partners to address barriers that some face in getting access to tax information and services.
- **Enterprise Data Management and Advanced Analytics** will help provide an agency-wide understanding of the taxpayer experience, identify emerging trends, and improve IRS operations.

The six components build on each other to create the best overall experience for the greatest number of taxpayers. When combined, the Taxpayer Experience Strategy creates a comprehensive taxpayer experience in which interactions with the IRS are **efficient**, **informative**, **personalized, convenient** and **secure**.

What it means for taxpayers:

- Less time waiting on the phone because of expanded use of appointment and call-back technology
- Convenient communication from the IRS, in different languages and preferred methods
- Easy and secure ways to access tax information, update personal accounts, communicate with and make payments from any device
- Personalized notifications about changes to tax situations, refund status, audit status and payments
- Easy-to-understand, accessible tax information and easier access to the tools needed to file complete and accurate returns
- Less time spent explaining issues to multiple IRS personnel, increasing the likelihood that the issue is resolved in one interaction

What it means for tax professionals:

- Simplified and streamlined methods for establishing power of attorney and other authorizations
- Secure access to clients' account information and notices
- Ability to perform other account service duties through their Online Account

What it means for IRS employees:

- Secure two-way messaging with taxpayers to more quickly resolve tax concerns
- A focus on live assistance situations because taxpayers won't need IRS to manage their accounts
- More efficient interactions with more available information through new technology such as artificial intelligence chat bots
- A secure, global view of taxpayer accounts, including real-time access to taxpayer records