



Global tax preparer improves customer support and reduces overhead with SkyCreek.

FinCo provides critical tax preparation services globally. Taxes are stressful, and FinCo seeks to provide products and services to offload the burden from its customers through drop-off, web, and person-to-person tax preparation support. Customer experience and satisfaction are incredibly important to FinCo.

THE CHALLENGE

Tax season is a busy time for FinCo. It means substantially increased customer volume and communication along with a corresponding expansion in workload in order to ensure that customers' taxes are being filed and their reimbursements are being processed efficiently. Given the high volume of customers, it also means

more requests for support at an increased capacity. This has cost implications, with each customer call to a FinCo employee potentially costing between \$2.50-\$3.50.

FinCo saw that its ability to adequately follow up with customers, provide ongoing updates on tax returns and ensure strong customer satisfaction was lacking. They also realized that there were more efficient ways to provide customers with information than having them call a 1-800 number and experience potentially long wait times. FinCo wants their customers to return and continue to use its services each tax season, but if customers experience poor service and long delays on hold and transfers, the likelihood they will return diminishes.



ABOUT THE COMPANY

"FinCo" is a major American tax and financial services company that provides services globally. They prepare millions of tax returns to meet customer needs.

CHALLENGE

Tax season means substantially increased customer volume for FinCo. It is important for them to identify how to best support all the different types of customers' needs, ensure that the customers have a satisfactory experience, and continue to see benefits from utilizing their services.

SOLUTION

SkyCreek led five creative and critical campaigns for FinCo which resulted in improved customer communication, customer service, cost-savings, and product analysis for FinCo.

BENEFITS

With SkyCreek's support, FinCo successfully reached 30 million customer transactions:

- Appointment Reminders and Rescheduling
- Fraud Notification
- Tax Refund Status

FinCo wanted to identify a strong telecommunications partner that would be able to lead customer communication and management using creative solutions that could also result in cost savings.

THE SOLUTION

SkyCreek was chosen by FinCo to lead a range of projects. These projects addressed challenges related to customer satisfaction and retention, appointment scheduling and follow-up, fraud notification and refund status follow-up.

There were initially three primary campaigns spearheaded by SkyCreek:

Customized Customer Satisfaction Survey

- Implemented a customer satisfaction survey for six years.
- Set a goal of contacting a target customer segment of close to two million to obtain completed surveys.

- Utilized interactive voice recording (IVR) and emails to distribute surveys.
- Shared survey activity and any poor customer survey scores back to FinCo.
- Transcribed customer verbatims, added sentiments and ranked each verbatim.
- Provided online access to surveys and verbatims.

Appointment Reminders and Missed Appointment Reminders Campaigns

- Responded to the fact that FinCo schedules millions of appointments with customers between January–April, with the majority of appointments occurring weeks to months in advance.
- Provided appointment and missed appointment reminders to millions of customers over the course of 13 years using IVR, email and SMS communication.
- Reached 100% of valid contacts to remind them of upcoming appointments or to reschedule.

The partnership has since expanded to include two additional campaigns around fraud notification communication and debit and refund status follow-up using SMS communication. SkyCreek consulted with FinCo to develop tailored messages for both campaigns to provide updates to common customer inquiries. Providing timely automated customer status updates reduced the burden on FinCo’s customer service team, allowing them to focus on more complex customer concerns.

THE BENEFITS

Leveraging SkyCreek’s exceptional customer management and communication solutions has enabled FinCo to provide improved customer service to millions of customers during times of increased stress. What’s more is that it has also reduced the company’s overhead costs significantly.

THE SOLUTION

