HOW OUR TAX RESOLUTION CLIENT GOT THE TRUE BENEFIT OF AUTOMATION

In this case study, we explore how unique automation workflows were developed for our tax resolution client which led to greater customer and unmatched user experience.

KEY METRIC

Community Tax now enrolls 80% of its clientele on the same day and sometimes even closes business on the first call.

80%

Same Day Client Onboarding

BUSINESS CHALLENGES

The founders wanted to implement a system that runs the entire tax service company instead of solving the micro-level needs for efficiency in sales and marketing. Moreover, the customer experience is essential for stressed-out individuals with tax issues.

Solving for customer experience becomes crucial because each client has 8-10 touchpoints. These touchpoints arrive across various departments, having different yet simultaneous processes. Most of the workflow processes were manual tasks which also required a broader perspective of the problem.

SOLUTION PROVIDED

SugarCRM provided the level of customizations and integrations that best served the company's requirements. Community Tax associated with SugarCRM solutions partner Nablasol to execute their strategy. They sought to improve both customer and user experience by implementing automated workflows as a top priority.

The high-touch processes at Community Tax were all automated using integrations and unique customizations. These processes consisted of marketing and lead management; initial screening (sales); approval and enrollment; billing and financing; investigation; tax prep; resolution; and ongoing monitoring. Now, the team was able to keep the client engaged throughout the customer journey. They had greater visibility and integrated data across all the touchpoints leading to better customer service and automation.
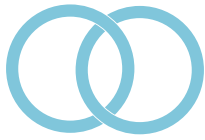
Customer Experience Fit

Increase In Employee Productivity

Improved Conversion Rate

Nablasol helped Community Tax design an automated workflow and a more engaging process that used a custom app to search for a case number. The application auto-fills all the fields and emails the customer a secure link to sign the required documents. This happens while the customer is still on call with the sales team.

Another automation feature developed was a seamless workflow to help customers navigate the telephone system or reduce getting transferred multiple times. We integrated their phone system SugarCRM which aided the identification of clients using caller ID ahead of time. It also helped in determining the stage they are in, and the service agent they talked to, and automatically route them directly to the employee.

IMPACT ON BUSINESS

Community Tax now enrolls 80% of its clientele on the same day and sometimes even closes business on the first call.

The various automation provided macro-, departmental-, and user-level visibility of the customer journey. Nablasol, as the company's Digital Transformation partner, played a crucial role in developing the customer experience fit of the tax service company.

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