How Jackson Hewitt Increased Booked Appointments by 41%

Overview

Jackson Hewitt

Jackson Hewitt Tax Service Inc. is the second-largest tax-preparation service in the United States, operating more than 6,000 franchised and company-owned locations. The organization prepares over 2 million federal, state, and local income-tax returns each year.

Challenge

Modernizing the Practices of Financial Institutions

For fifteen years, Jackson Hewitt had been booking appointments using an outdated, homegrown system that offered limited functionality.

Shift in customer expectations. Many customers now expect to be able to book and manage their appointments online. Jackson Hewitt's team understood that they needed to revamp their booking process to improve the customer experience, and to increase appointment and tax return volume for franchisees.

Little visibility into franchise performance. Through the old system, access to appointment data was limited and management had no visibility into upcoming, completed or missed appointments. This made it impossible to track franchise performance through key metrics like volume of appointments or no-shows.

Failure of internal build. Initially, Jackson Hewitt tried to build its own new system, not realizing the complexity required for an enterprise appointment scheduling solution which accommodates multiple locations, staff members, and timezones and that integrates with existing technology. Upon deployment, it became clear that the system failed in several key functional areas, and was not user-friendly for tax preparers or customers.
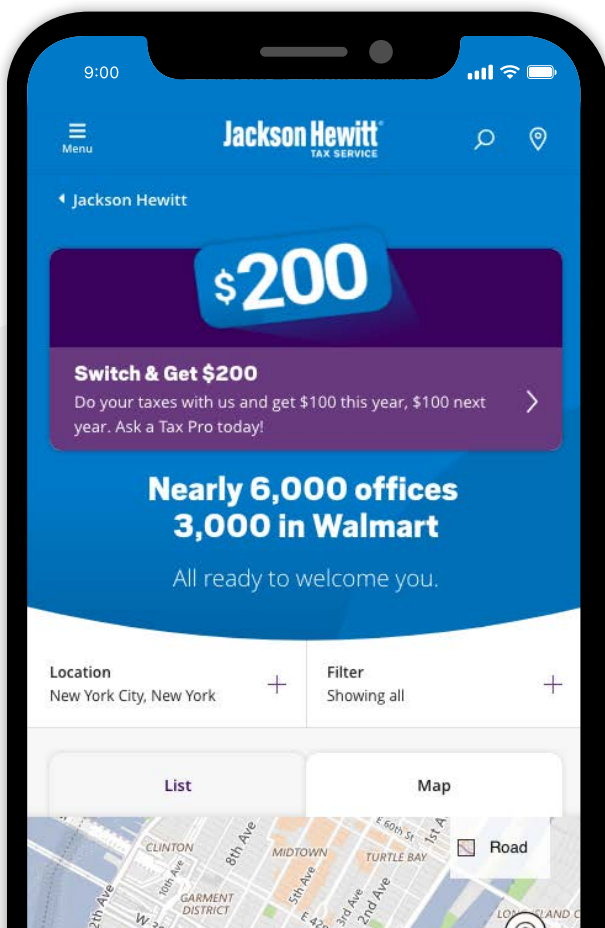
Solution

Implementing a Robust, Customizable, Digital Platform

After abandoning their internal build, Coconut Software was one of twenty applications submitted through an RFP process and was selected for its security features and ability to customize the customer-facing appointment booking journey.

Before rolling out the new software, the Jackson Hewitt team wanted to ensure that it would be easy and accessible for customers and that franchises would incorporate the software into their daily operations.

Encourage franchises to adopt. To ensure that tax preparers would use this new solution, Jackson Hewitt linked it to the preparer dashboard and used it to track key franchise performance metrics. Knowing that they'd be evaluated on completed, canceled, and no-show appointments, franchisees saw the importance of ensuring that their staff used the software rigorously.

Make it easy for customers to access. Jackson Hewitt kicked off customer adoption by making the appointment booking calendar link accessible from as many touchpoints as possible:

- Their website
- Their loan prequalification website
- Their tax return portal
- In email communications
- In TV and radio promotion

> " *Don't wait to implement appointment scheduling—do it immediately! You can miss out on valuable appointments if your customers have to wait until working hours to call and book in. Whether the business is ready or not, your customers are ready to start booking appointments online.* "
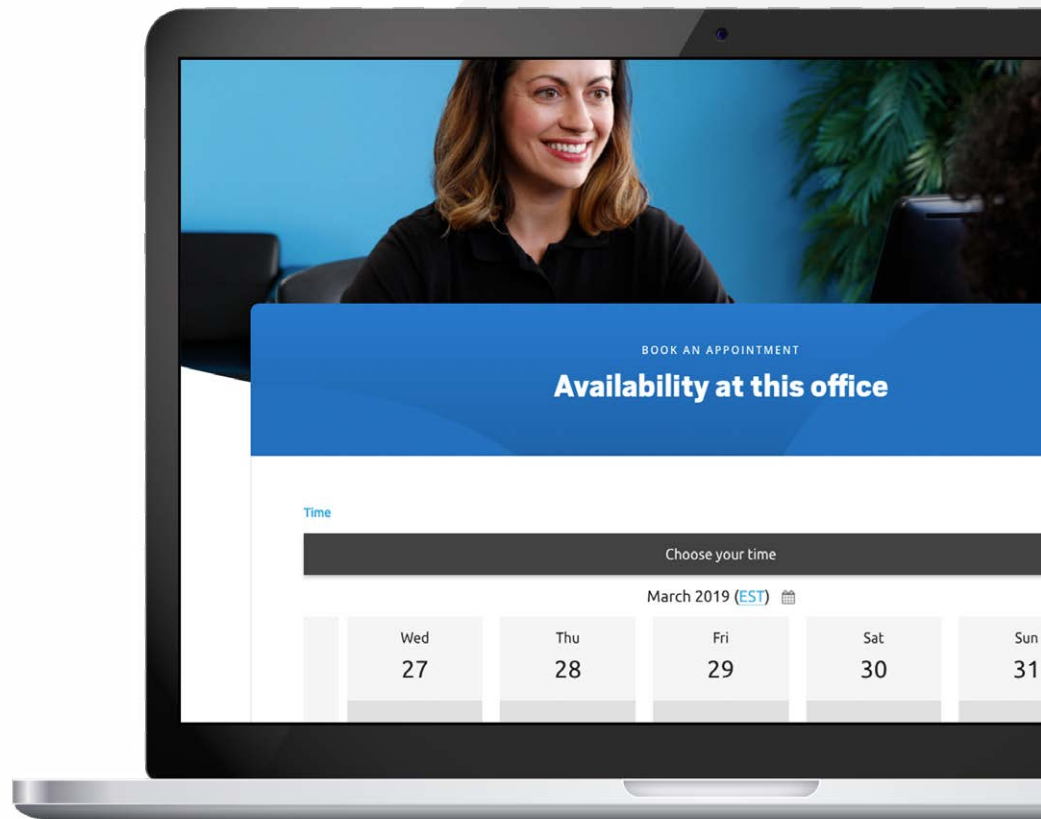
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Shara Abrams
Senior VP, Operations at Jackson Hewitt

Results

Dramatic Increases Across the Board

As a result of implementing Coconut Software, Jackson Hewitt has seen the following results and continues to track appointments as a key indicator of business success...

41% increase in booked appointments (2016-2018)

8% increase in kept appointments (2016-2018)

3x higher conversion rate for clients who booked an appointment to complete a tax return (2018)

55% of new client starts via online channel versus walk-ins (2018)

With access to these appointment data points, reviewing Coconut Software reports across franchises has become a key part of Jackson Hewitt's executive morning meetings and:

Enables better workforce management decisions. It's now possible to see which days and locations will be busier, so tax preparers can be moved to where there's a higher volume of work.

Shows trends by location or preparer. Trends in no-shows or repeat customers can highlight areas for improvement or can be used instrutively as best practice examples.

Makes it possible for more integrated customer data management. Through their loan pre-qualification site, new customer details are now linked with appointment booking.

"

I had some old school franchisees who were reluctant to transfer over. Now they've done it, love it and can't believe that they waited. Every time I go in our offices now, I see our preparers with their calendar up, and they constantly tell me how great it is. They love the features, and that our clients can easily make appointments online, without calling in. We love the reporting, and that we can link appointment data to customer information.

"

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About Coconut Software

Coconut Software is transforming how financial institutions engage with their customers by allowing them to effortlessly manage on-demand and pre-booked appointments with real-time insights to optimize results. Working with financial services, like Jackson Hewitt, First West, Connect First, and RBC, we understand that your enterprise scheduling needs are complex and we are committed to delivering a premium experience to each of our valued clients.

Visit: coconutsoftware.com or call 1-888-257-1309