



IMPACT STORY

H&R BLOCK® + inmoment

The Context

Since 1955, H&R Block has been helping customers navigate one of the most dreaded times of the year: tax season. The bulk of H&R Block's business is seasonal, and its clients have a non-negotiable deadline enforced by the Internal Revenue Service. H&R Block's 12 contact centers field a massive number of calls from customers who expect timely service from an engaged, knowledgeable agent. These centers are not only essential channels for questions and issue resolution, but knowledge hubs for understanding client needs and expectations.

The Opportunity

With so much of H&R Block's business condensed into a short and intense timeframe, collecting, analyzing, and acting on customer feedback—in time to make a difference—is especially challenging. Before partnering with InMoment, H&R Block call center agents emailed each individual customer the day after an interaction to request feedback and followed up the following day. Instead of really connecting with customers, agents spent the majority of their time on mundane tasks and data entry. Even worse, the

broken process netted low response rates and had a 8-10 day turnaround, practically eliminating the possibility of resolving the most important concerns.

The Impact

InMoment helped H&R Block implement a feedback process that automatically invites customers to leave feedback over the phone—still the most important and personal channel for their customers— immediately after receiving support from an agent. InMoment's advanced, industry-tuned text analytics analyze the data and identify specific customer issues, as well as areas of opportunity down to the agent level. These very specific and near real-time insights allow individual customer concerns to be addressed immediately and enable managers to devise personal coaching plans.

This new, streamlined process reduced handle time by 5-8 seconds per call and resulted in 4x the response rate, delivering richer data and more powerful insights. The specific coaching plans helped agents have more productive conversations with customers and increased first call resolution rates by 5 to 7 percent.

In addition to individual customer and agent impact, H&R Block also uses customer experience intelligence to improve major operational processes, including how it communicates with customers, confirms and keep appointments, and hires and trains the right agents to deliver great experiences.

What's Next

H&R Block is now monitoring feedback on social media through its chat support function, allowing customers the opportunity to conveniently leave feedback in the urgent moments of tax season.

SUMMARY

- **Feedback engagement increased by 400 percent**
- **Handle time decreased by 5 to 8 seconds per call across 12 contact centers**
- **First call resolution rate increased 5 to 7 percent**