



ScreenMeet Helps Tax Giant Go Virtual During the Pandemic



**Increased first call
resolution**



**Decreased support and service
reopen rates**



**Decreased costs and increased
revenue**

The Before

This customer has provided tax consulting, financial products, and small business services for over 60 years. The company was already moving toward providing a virtual experience for its customers when the COVID pandemic forced the company to close its brick-and-mortar locations in 2020, forcing it to take its signature in-person experience to the customer without a storefront.

The company needed a way for customers to share information and have real-time video interaction with the tax advisor using a standard web browser. And with 80,000 tax advisors at 10,000 retail locations, it needed to do so at a massive scale.

The After

- Leveraged ScreenMeet's cloud based screen sharing technology that is fully embedded within Salesforce as key technology to their transformation.
- Enabled tax filers that had issues with the self-service filing tool to obtain faster resolution to problems on the first interaction.
- Provided tax filers and tax pros with the ability to simultaneously screen and video share while discussing filing questions.
- Leveraged solution in a strong video ad campaign.
- Transformed the company's service and support unit from a cost center to a revenue center.
- Virtual customer interaction is becoming the primary method of how customers consume the company's services.
- Increased customer satisfaction which drove to retention in following year.
- Increased agent satisfaction which improved ability to attract Tax Pros from the competition.
- Agents can work remotely and offer interactive tax services to all clients virtually.
- Entire interaction is saved to CRM (Salesforce) for complete traceability and quality analysis.



ScreenMeet

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Learn more about ScreenMeet
for Salesforce here.

Why ScreenMeet?

The fact that ScreenMeet does not require a client download was a determining factor for the company since granting permission to install software is a barrier for clients. In addition, ScreenMeet allows complex interaction between the agent and the customer – scroll, click buttons, answer questions – all with security and privacy. In the past, agents were encouraged to minimize time on support calls.

With ScreenMeet, extended interactions between the agent and the customer have increased customer satisfaction and revenue, transforming the service and support unit from a cost center to a revenue center. Using ScreenMeet, the company can capture the entire interaction, associate it with the CRM record, and have complete traceability.

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Taking the physical office out and going virtual is a major cost savings for us. Virtualization also increases the productivity of the tax pros.

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This gives our business options. Our stores remain open, but now we can offer virtual service to anyone who prefers to interact with us virtually. Plus, we keep continuity of business.

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The virtual service center offers support for Do-It-Yourself tax preparation. We have contextual help, chat, chatbots, and FAQs – all to help the customer resolve the issues. But if they cannot resolve their problem or, more typically, become uncomfortable with the tax logic, we can route them to a live tax professional using ScreenMeet.

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We are modernizing our service organization and migrating towards technologies that will be part of the comprehensive solution of our call center.

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The ability of ScreenMeet to capture the entire interaction and associate it with Salesforce Service Cloud means we now have complete traceability and can perform quality analysis on those interactions.