



Liberty Tax Service

# TEXT MARKETING

# US411<sup>TM</sup> CASE STUDY

Liberty Tax Service – Staten Island, NY





Liberty Tax Service

# TEXT OPERATIONS SYSTEM

*“Liberty  
sends a  
text when  
your”*

– Anthony Focca

## INTRODUCTION

Liberty Tax Service is one the nation’s largest tax preparation and filing services. Established in 1998, Liberty Tax Service has grown to over 4,000 locations nationwide. Anthony Focca, a franchise owner located in New York, manages multiple franchises in a very competitive and concentrated area. In an effort to eliminate expensive and time consuming phone calls to provide status updates, Anthony decided to adopt the Convergent Mobile Text Operations System.

## THE PROBLEM

During tax season, tax preparers see hundreds of clients. Anthony’s six Liberty Tax Service store locations are responsible for overseeing and preparing *thousands* of client tax returns annually. Once a client’s tax return is submitted, the local Liberty Tax location remains in regular contact regarding status. The local office notifies each client if there are any issues with the submitted return, as well as, when their refund check is ready. This requires multiple phone calls and restrictive messages to each customer. With the volume of returns during tax season, the number of status calls required Anthony to hire additional employees to make the necessary phone contacts - an aggravating increase in expense, solely focused on a required but mundane task.

## THE SOLUTION



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# TEXT OPERATIONS SYSTEM

## THE SOLUTION

The Convergent Mobile Text Operations System allowed Anthony to automate all required status messages. Each client can receive text notifications, during the submission process. With a client's information streaming from 'LibTax', Anthony now had the ability to automate messages via text. These text messages inform his clients of the status of the tax return, from submission through refund check. With the Text Operations System, he was also able to see if his client received the text messages. According to Anthony, his clients loved the text message notifications and even recommended Liberty Tax Service to their friends stating:

***"Liberty sends a text when your refund check is in - no more waiting!"***

***"With such great customer support and the amazing results with just one keyword in a single day, the US411 text message marketing campaign product is a great investment for any brand at a corporate level."***

– Richard Weisenberg

## THE RESULTS

After implementing the Convergent Mobile Text Operations System, Anthony was able to save time and more importantly, money. The ability to send automated status text messages removed the need to hire additional employees to make tedious phone calls notifying clients of their refund status. Not only did this automation save time and money but dramatically helped to improve the Liberty Tax customer service experience.

The corporate office of Liberty Tax Service now believes so strongly in the Convergent Mobile Text Operations System that they provided it to all franchisees through ZeeNet. Franchisees have the option to adopt this solution at no cost to them. With the incredible results that Anthony has seen, he feels all franchisees should utilize this solution, insisting,

***"Anything that can save money while improving customer service, is a great tool. I recommend it to all Liberty Tax Service franchisees."***