

“80% of my clients booked their own appointments via the text campaign... saved me at least 60 hours!”

Central Valley Tax Services (CVTS) has been providing consumers with help developing financial plans, tax strategies and tax preparation.

OBJECTIVE Firm was looking for a way to grow the practice and save time so that precious billable hours weren't spent on trying to set up client appointments, reminders and sending out tax change notifications

THE CHALLENGES Central Valley had been using emails, calls and texting clients (one-by-one) to schedule appointments, but found this was extremely time consuming and frustrating. It wasn't the level of service they wanted to provide in this highly competitive financial services sector.

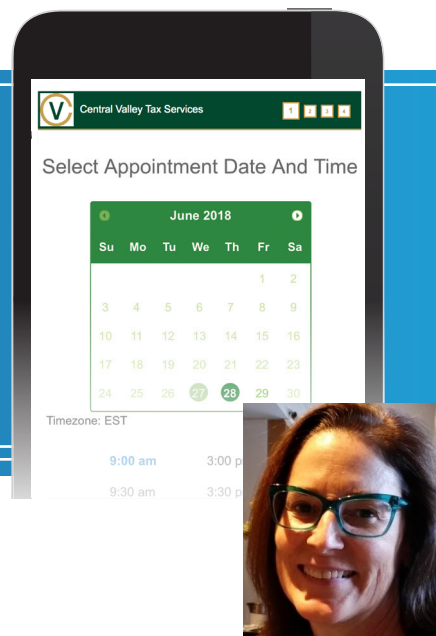
- Current methods of communications were inefficient... needed a more automated way
- Referrals were key to business growth and firm was interested in new, more innovative ways to boost referrals
- The firm also needed an effective way to inform clients of issues during the year—tax changes, new services, policy shifts

A NEW APPROACH Textellent worked with CVTS to leverage the data in their existing tax software to send text messages triggered by return status identified in the tax software. Here are some examples:

- All clients received an appointment invitation via text with a link to create an appointment based on prior year's appointment timing
- Once tax forms were filed, clients got a thank you and a friendly text asking them for referrals which generated new clients
- Appointment and missing paperwork reminders went out automatically to clients triggered by the tax software
- CVTS sent out personalized birthday greetings automatically to clients

THE IMPACT Appointment scheduling using texting saved over **60** hours during tax season and **80%** of the clients (of all ages) made their own appointments.

- Clients loved the automated scheduling. They even sent great feedback when they received the automated reminders
- The firm was able to recover more billable time that could be spent serving new clients
- The client base grew by 20% in one tax season using the automated referral campaign and linking review requests to Facebook
- Sending automated, yet personal birthday greetings and holiday greetings has been very well received
- Clients have made a point of thanking Carole for this new level of service and customer retention has increased



“I love, love, love this product. I don't know why everyone doesn't use it.”

Carole Sanchez, Central Valley Tax Services

COMPANY

Central Valley Tax Services

INDUSTRY

Financial Services

HIGHLIGHTS

- Using Textellent CVTS grew their business **20%**
- **80%** of their clients used the link in text invite to schedule appointments
- 60 hours of billable time was saved off-loading appointment setting
- Requests for referrals and reviews on Facebook generated many new clients



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