

Tax Preparation Leader Names ResultsCX the Champion Site for Annual Surge Nine Years Running



Industry - **BFSI**

For tax preparation companies, the annual surge of tax season is a recurring make or break moment. Having the right seasonal staff in place is essential for maintaining reputation and ensuring client retention.

Challenge

When tax time rolls around, this leading U.S. financial services company faces the following possible issues:

- Annual ramp requiring expansion from 50 to 500 FTEs
- High customer expectations for agent proficiency from Day One
- A high need for personnel that only lasts a few months

Solution

Even after 10 years of delivering this seasonal ramp, improving processes and approach are still a ResultsCX focus:

- Prepare for surge well in advance by front loading leadership
- Recruitment strategy includes bring back programs, employee referrals, university partnerships, and leveraging counter cyclical programs
- Training curriculum reviewed / strengthened yearly to ensure faster time to proficiency
- Cultivated relationships with seasonal hires through end of season town halls and regular check-ins throughout the year

Results

10 years of delivering this seasonal ramp has developed deep expertise, demonstrated in the following metrics:

- Most recently delivered 125% of required staff
- Achieved 94% handle rate, vs. 90% goal
- Exceeded positive and negative sentiment scores
- Top performing vendor for 5 consecutive seasons
- Awarded & launched a new BaaS (Banking as a Service) line of business
- RCX awarded 100% steady state volume in 2023 – base (steady state) FTE increased to ~100

