



VIRTUAL
OBSERVER

Jackson Hewitt

A VIRTUAL OBSERVER CASE STUDY

VO Helps Jackson Hewitt Increase Adherence, Agent Engagement, and Performance

Jackson Hewitt Tax Service Inc. utilizes Workforce Engagement Management (WEM) solutions throughout their contact center to help them evaluate their agents' performance, analyze their information, and increase their efficiencies.

Jackson Hewitt Tax Services' mission is to provide its hard-working clients access to simple, low-cost solutions to manage their taxes and tax refunds. To run their company successfully, they need to have effective support staff in place to meet their customers' demands.

The Problem: High Shrinkage and Rapid Seasonal Growth

Until recently, Jackson Hewitt's Contact Center was challenged to get accurate insights into their agents' real-time activity. The Contact Center was experiencing schedule adherence issues and event codes meant to track agent time and working activities weren't intuitive, so they weren't being utilized by agents. As a result, Jackson Hewitt was experiencing an acute shrinkage problem, which if not addressed, would result in longer than desirable wait times and compromised service levels.

Also, to meet the seasonal demands of tax season Jackson Hewitt's Contact Center grows from 50 seats to 250 seats making scheduling that much more complex.

Refusing to jeopardize customer satisfaction Jackson Hewitt implemented Virtual Observer (VO) Community and with its tight Five9 integration they had immediate insight into agents that were repeatedly out of adherence (leaving early for breaks, returning late, etc.). The solution quickly provided management the valuable information needed to make take the appropriate corrective actions.

The Solution: Make Information Meaningful

How was VO able to help alleviate the problems that Jackson Hewitt was facing in their contact centers? "The first thing we did is conduct an audit on all of the event codes," said Adam Peters, WFM Specialist at Jackson Hewitt. "We were able to delete codes we didn't need, keep codes for historical purposes, and create new codes. We also re-classed codes to be consistent with agents' off-phone time and on-phone time. This revamping made it easier to convey to teams what the downstream impact was of applying different types of codes, and also helped to improve their metrics."

Next, we trained employees internally (Adam's team) and externally (agents). We explained to them what the impacts were of using different codes. This way, agents could better manage

their adherence. Of course, we could also use the information to decide whether to bring people back next season or to exit them.

VO Community's integration with Five9 provided a great feedback loop for Jackson Hewitt. "I am really thrilled with how VO Community could display that and easily aggregate the data into a dashboard. It makes it easier to extract something meaningful from the data. This allows me to have more of an impact on the business," said Peters.

The other thing about VO Community that helped Jackson Hewitt was the Data Targets. "This was a godsend," said Peters. "It's easy to export data files. Now I can quickly see before-and-after scenarios. I can see if we are getting a better and more accurate reading on adherence. And, if so, if it is a positive impact. After getting a year's worth of data, I could see that after making the change to standardized codes, our adherence was great. It increased because we had better communication with the agents. They knew what to expect and what to do."

"In another example, we changed absent codes to count against adherence. But we learned that, if an agent calls-out, they shouldn't be 100% compliant because they didn't just log in. They should be 0% compliant because the agent should be working!" So, we saw our adherence dip. The data gives us more accuracy to what the current state-of-the-union is on adherence, to schedules. "Do we have a lot of call-outs? How does it manifest? Then I can drill in from there," said Peters. This example combined the functionality of VO Community with Jackson Hewitt's methodologies and best practices. Partnering those two was extremely helpful.

The Outcome: More Consistency Leads to More Accountability

When people don't show up for their scheduled shifts, there is a negative business impact for customers since no one can answer calls. Unanswered calls result in dissatisfied customers who might look elsewhere for services. Plus, there's also an operations side to the story. Jackson Hewitt is a franchise business. "We support our franchise offices when they can't get their computer to work, or they can't get their tax software to do what they need. They call us," explained Peters. So, any time those agents are on hold (because someone on Adam's staff didn't show up for their shift), they're losing money—and Jackson Hewitt is losing money, too.

According to Peters, "In both cases, we need to know where the outliers are. Who is consistently not sticking to their schedule?" This information allows Adam's team to coach agents if they have adherence issues, so they can achieve consistency and answer more phone calls. It also potentially helps exit people that are consistently an issue. "In those cases, we schedule them, we look at the forecast, and we think we have enough people to handle the expected contact volume. But if they call-out consistently, then we actually don't have enough people to handle our calls," he explained.

Jackson Hewitt is in a maturity phase right now. "We know we're getting good at finding issues," said Peters. Acting on those issues helps Adam's team making more reliable scheduling forecasts. They have people they can rely on, and they can handle their contract volume.

The goal for the agents is to stick around at Jackson Hewitt, long term. There's a retention bonus each season. If someone avoids a first or second cut, it's validating for them. They know they're doing the right things. "They see that their performance is related to the metrics that we put in place—mainly attendance but also handle time, NPS, and others. It has a very positive effect," said Peters.

"[Cloud-friendly solutions](#) like Virtual Observer Community WFM are transforming the financial services market, enabling growth at a scale which was previously unavailable," said Dave Brower, President at Virtual Observer. The solution's integration with Five9 further benefits a company like Jackson Hewitt because it balances the need to contain costs with the need to maintain great customer experiences and it does it without the complex, expensive and time-consuming management of on-premise hardware and software.

The company has work to do to get deeper insights. In addition to the tangible impact VO Community has had, Adam's team and Jackson Hewitt agents appreciate that things are more transparent today. Their people are more engaged, and their overall morale is higher. They are more likely to recognize a problem and react quicker, and they can also be more consistent with training. Turnaround time to onboard employees successfully is a big deal at Jackson Hewitt. That also frees up Adam's time to do the actioning part of her job, which is the most important thing.

About Virtual Observer (VO)

Virtual Observer (VO), is a cloud-friendly, scalable Contact Center Workforce Engagement Management (WEM) solution right-sized to your business today and tomorrow. Providing an extremely high value to price and tremendous customer satisfaction it differentiates itself by offering industry-leading WEM-enabled omnichannel CRM Integrations for Salesforce, Zendesk, Oracle Service Cloud, and ServiceNow Platforms.

About Jackson Hewitt

Jackson Hewitt Tax Service Inc. is an innovator in the tax industry, with a mission to provide its hard-working clients access to simple, low-cost solutions to manage their taxes and tax refunds. Jackson Hewitt is devoted to helping clients get ahead with Maximum Refund and 100% Accuracy Guarantees. With close to 6,000 franchised and company-owned locations, including 3,000 in Walmart stores, and online and mobile tax solutions, Jackson Hewitt makes it convenient for clients to file their taxes. For more information about products, services, and offers, or to locate a Jackson Hewitt office, visit www.JacksonHewitt.com or call 1 (800) 234-1040.