

# TurboTax

## TAX PREPARATION SERVICE USES COTWEET TO STREAMLINE TWITTER USAGE, DECREASE RESPONSE TIME

TurboTax® is the nation's leading tax preparation software from Intuit Inc. TurboTax makes it easy for Americans to prepare and file both federal and state income tax returns quickly and accurately.

Since it was founded in the mid-1980s, TurboTax has relied on word of mouth marketing as its primary growth driver. Over the past four years, TurboTax has increased its presence in social media channels like Twitter as an additional way to engage with its 20 million customers. TurboTax now uses CoTweet to interact with customers via Twitter, making it quicker and easier for the company to connect with its customers.

### USING TWITTER FOR CUSTOMER SUPPORT

TurboTax has a track record of using communities to help customers get answers to their tax and technical support questions. Its Live Community has been used by more than 10 million people since it was introduced three years ago. This year, with help from Dachis Group, a social business consulting firm, TurboTax created the @TeamTurboTax Twitter presence, as well as a process to enable the company to quickly and proactively address customer matters in short form. And because Twitter is a public social media tool, TurboTax has been able to better meet their customers where they're at, providing help almost immediately after a question is raised.

“ People expect brands to have a social media presence. We see delight and excitement from our customers every time they realize we're on Twitter—and with CoTweet, we can help them as quickly as possible, no matter where they are. ”

— CHELSEA MARTI  
Manager, PR and  
Social Media  
TurboTax



## SEE FOR YOURSELF

Interested in using CoTweet, but want to give it a “test drive” first? Now you can—for free! By downloading our free public beta, you’ll have access to all the functionality of CoTweet so you can start taking control of your brand on Twitter as soon as possible. [Click here to download the free public beta today!](#)

However, with relatively few employees responding to customers on Twitter, TurboTax found it difficult to operate in a timely and efficient manner from a single Twitter account. Customer questions received over Twitter were copied and pasted into an email, sent to the appropriate expert within the company, and finally responded to after a long chain of email forwards and replies. TurboTax needed a way to bring together the power of Twitter and their internal knowledge, while streamlining processes to arrive at a fast and efficient way to serve customers. By working with Dachis Group and CoTweet, TurboTax has found the perfect middle ground for managing Twitter processes and maximizing customer support.

“Before, we were using email to assign tweets out to the right person. With CoTweet, we’ve been able to scale our Twitter efficiency by 20 times,” says Chelsea Marti, PR and Social Media Manager for TurboTax.

### A STREAMLINED APPROACH

TurboTax worked closely with the Dachis Group to develop a strategic approach to customer service, focusing on the culture, process, and technology needed to make the initiative successful and scalable. Early in tax season, TurboTax laid the groundwork for the initiative: they established a core team of experts and enthusiasts who saw the potential in a social service team, identified the process to train and scale the initiative, and selected a platform that would allow the company to engage with customers efficiently and effectively.

With CoTweet, TurboTax can search for Twitter users who need tax help, assign customer tweets to the right expert within the organization, track conversation history, and respond to the customer—all through a single platform. TurboTax now relies on CoTweet to help enhance its Twitter presence in a number of ways, including:

**FASTER RESPONSE TIME.** With CoTweet, TurboTax no longer has to worry about assigning tweets through email. All participating TurboTax employees, from marketing professionals to veteran tax experts and support representatives, can receive “Twitter assignments” directly through CoTweet. To ensure that customers receive the correct answers to their questions, it is imperative that TurboTax readily identify and pass questions along to the appropriate person within the organization. With CoTweet, experts can see questions quicker, **allowing TurboTax to cut their response time down to just four minutes.** “Now, our customers have another option to get help quickly and easily. By searching for TurboTax conversations on Twitter, we can help them faster—wherever they are,” says Marti.

**MEASURED APPROACH.** Through features like multiple accounts/users, conversation threading, and messaging archives, CoTweet helps TurboTax streamline work flow and manage social media

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communications from customers. “By engaging in a systematic process, TurboTax is successfully using Twitter for customer service. Further, they will be able to scale the initiative for future growth, and are poised to become a leader in the industry and social space,” says Kate Niederhoffer, Principal Engagement Manager for Dachis Group.

**TRACKABLE RESULTS.** Defining goals and metrics up front is crucial in order to track success and make a compelling case to any organization. CoTweet also allows TurboTax to track conversation history and view valuable reporting metrics. Marti believes CoTweet is extremely helpful in providing a 360-degree view of Twitter presence, allowing them to see which areas of customer support are well-covered and which areas could use more attention. With CoTweet’s robust reporting, TurboTax can take actionable data back to company executives in order to analyze tweet volume and overall social media value.

In addition, TurboTax has been able to better gauge feedback from the customers they interact with on Twitter, achieving tremendous results like:

- 48% effectiveness in helping complete tax returns
- 46% follower rate of Twitter users specifically seeking tax help
- 71% likelihood of customers to recommend TurboTax

**ACTIVE EMPLOYEE ADOPTION.** Though the social media know-how of the entire TurboTax staff ranged from “minimal knowledge and exposure” to “tech savvy experts,” everyone on the team has been able to correctly and effectively use Twitter and CoTweet through coaching, team trainings, and one-on-ones. Knowing the importance of a unified approach to business through social media, **TurboTax has been able to increase employee participation on @TeamTurboTax from six people to 40 people within one tax season.**

## BOTTOM LINE

Now with a streamlined approach to their Twitter presence, TurboTax sees a bright social media future. “As Twitter continues to grow at an incredible rate and customers continue to expect help via Twitter, you can expect that we’ll continue to actively participate in this growing channel,” says Marti.

As consumers adopt more and more social media tools, it’s critical that businesses meet their customers where they’re at—and with CoTweet, leveraging social media is easier for both your staff and your customers. Through the ease and power of CoTweet, social media management is simpler—so you can focus instead on building customer relationships and growing your business.

Ready to get started? Give CoTweet a try today.

SIGN UP FOR THE FREE PUBLIC BETA AT [WWW.COTWEET.COM/SIGNUP](http://WWW.COTWEET.COM/SIGNUP)

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