

“The service has made it easier for me to sell to new franchisees by showing how easily we can help them grow their business!”

Ten years ago Nick Maldonado and Oscar Toro had a vision to provide an opportunity for business-minded professionals to own their own tax preparation business. In 2014 they decided to franchise their concept and it has now grown to over 100 stores across 9 states!

OBJECTIVE The key to a successful franchise operation was to help franchisees acquire new customers, increase client engagement and retain as many of them as possible. The ability to control the message, drive and monitor the customer experience was also important so best practices could continue to evolve.

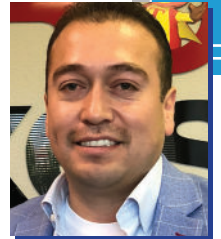
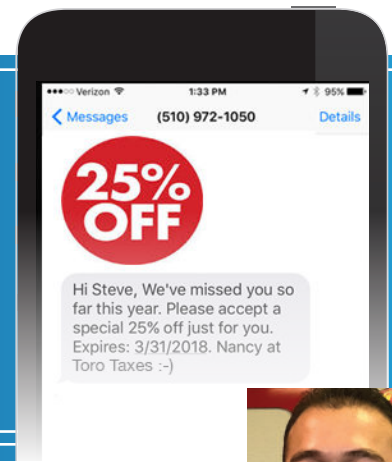
THE CHALLENGES Prior to Textellent, Toro Taxes used email and letters to reach out to clients and potential customers. This was no longer working well and didn't provide the opportunity to better serve existing clients or engage them year-round. This approach also took enormous staff time with limited results.

- Customer retention and satisfaction was slipping
- Emails to clients were going unnoticed and appointments were being missed
- Sending letters meant even lower results and returned mail mounted
- Many stores were too busy to even send mail and email during peak times

A NEW APPROACH As a quickly growing franchisor, Nick needed a better approach and determined that texting might help. He wanted a platform that could give the corporate office control over the messages and tone, but also be used easily by all of all 100+ stores. The pilot over the course of 90 days with 22 stores showed that 79,000 messages were sent, all 1-to-1, personalized, timely, and relevant, receiving an unprecedented 18% response rate which thrilled the management. The service is now being rolled out across the remaining stores. Here's how Textellent is being used:

- Corporate selects the text messaging campaigns they want to conduct and crafts the messages to align with their brand
- The service sends individual messages as though they came directly from the store manager from a “real” phone number associated with the store
- Store staff responds to incoming texts or calls with a personal touch from any device at any time
- If the stores are too busy to respond, corporate is monitoring and can help step in during peak periods
- Corporate monitors responses to see which campaigns work best
- Appointment reminders go out automatically to eliminate “no-shows”
- After service is complete, corporate sends a personalized “thank you” asking for referrals
- To improve engagement during the year, “happy birthday” and holiday greetings are sent via text. They also text financial tips

THE IMPACT ToroTaxes stores loved the new automated system with rule-driven, automated, yet personalized messages as it allowed them to focus staff on customer service rather than administrative minutiae.



TOROTaxes

“I have a number of different businesses and I am so impressed with this platform that I am rolling out this service to them as well!”

Nick Maldonado, CEO Toro Tax Franchising

COMPANY

Toro Tax Franchising LLC

INDUSTRY

Financial and Business Services

HIGHLIGHTS

- Client satisfaction rates increased due to better engagement between stores and clients
- Paper-based mailing were eliminated
- Saved **5,284** hours in staff time by using an automated texting platforms vs crafting individual messages
- Store owners and managers satisfaction skyrocketed



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