

“We got so many referrals using text marketing we had to turn the feature off — we couldn’t keep up!”

D&J Professional Services helps small businesses with business plans, financial planning services, tax strategies and tax preparation. They work with a range of clients that come from all walks of life and own a wide variety of businesses.

OBJECTIVE Wanted to increase customer retention, generate more referrals from existing clients while reducing marketing spend and staff time.

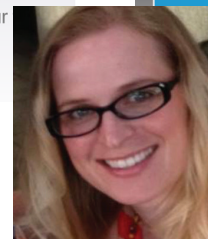
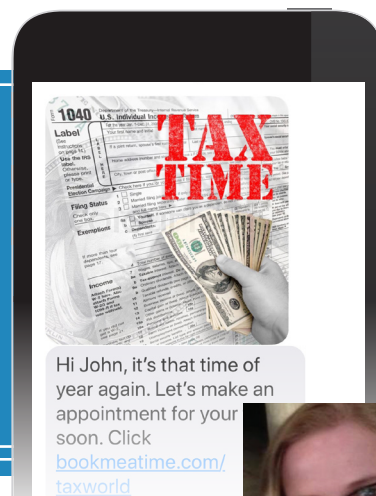
THE CHALLENGES D&J had been using traditional marketing approaches such as email and phone calls to communicate with business clients. Their business is appointment driven. Setting up and managing appointments was very time consuming. They needed a more efficient way to manage these activities.

- The professionals were constantly interrupted with client calls regarding administrative and appointment details vs doing “billable” work
- Customer retention was lower than desired requiring them to find new clients each year to backfill
- Emails to clients were going into SPAM with only 10% generating appointments
- Postcard mailing was expensive, took tremendous staff time and yielded even less results
- Business growth had stalled and they needed some new approaches, yet wanted to avoid hiring more staff

A NEW APPROACH D&J learned about text marketing and Textellent through a webinar they attended regarding growth strategies. Working with Textellent they decided on the following campaigns:

- They texted their clients before year end to get them to make appointments about tax strategy—they included a link to schedule appointments in the text invitation
- These one-to-one messages were customized automatically and sent to clients based on the time of year the client had come in previously
- Once a client had an appointment, reminders would go out automatically to eliminate NO SHOWs
- Following an appointment, each client automatically received a personalized text thank you politely asking for referrals
- Throughout the year they sent texts to clients wishing them happy birthdays, holiday greetings and informational messages about IRS scams and other tips generating pleased clients and more referrals

THE IMPACT D&J found that their business within 3 years of using Textellent grew **30%** from their 2014 starting point with the new referral programs in place. Their retention rates bumped up to approximately **95%**. These results came without the need to hire additional staff and they decreased their previous marketing spend.



“We are so grateful to Textellent... we can’t live without it at this point!”

Jennifer McCarney, Co-owner D&J

COMPANY

D&J Professional Services

INDUSTRY

Financial and Business Services

HIGHLIGHTS

- Using Textellent D&J grew their business **30%**
- **70%** of their clients scheduled their own appointments without further emails or calls
- Requests for referrals were so successful they had to turn the feature off since they couldn’t keep up
- Information texts (such as the IRS Fraud alerts) generated great feedback and even more referrals
- Costs of postcard program were eliminated & staff time saved



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