

# Case Study: H&R Block

## INTRODUCTION

H&R Block generates the vast majority of its business during tax season, from January through April 15th. The Razorfish eCRM team worked with the Digital Tax Solutions group at H&R Block to drive online transactions of its TaxCut® online and software products through email to its current subscriber list.

## CHALLENGES

Email campaigns at H&R Block have traditionally been calendar-based, using thematic campaigns tied to a specific week or month. Response to these campaigns has been variable, and diminishes over time. H&R Block struggled with how to engage users on a more personal, timely basis. Usage of database elements and previous behavior has been limited, and so we sought to send more relevant emails which might drive higher response than the ad hoc emails usually being sent.

## SOLUTION

For the 2009 tax season, Razorfish recommended establishing an automated program which would send triggered messages based on the recipient's tax filing date the previous year. The objectives were:

- Use event timing triggers to better target promotions to early season filers – providing a higher level of personalization and relevance to the customer.
- Use the program as a test vehicle for triggered messaging and assess incremental lift versus typical mass promotional campaigns.

Customers entered an automated email path if they had not registered by 2 weeks prior to their 2008 tax filing date. The email messages were related to early season filing and “Happy Tax Anniversary” messaging.

- Email 1: Sent 14 days prior to prior year file date.
- Email 2: Sent on prior year file date.
- Email 3: Sent 7 days after prior year file date.

## RESULTS

The program results surpassed all expectations, and clearly demonstrated the value of using database elements for increased targeting and message relevance. All triggered program metrics exceeded regular promotional campaign metrics:

- The overall Open rate was 15% higher than regular promotional mailings.
- The overall Click to Open rate was 117% higher than regular promotions.
- The overall Conversion rate was 271% higher than regular promotions.