



“With ServiceNow, we’ve transformed how we engage with customers. We’ve done all of this with just 1.5 full-time technical resources – our business analysts now work directly with our internal business partners to create solutions.”

This ServiceNow case study is based on an interview with Darrel Popowich, Vice President of Information Technology at H&R Block Canada



Organization

H&R Block Canada

Highlight

Recognizing the value ServiceNow could bring across the entire business, H&R Block extended the solution from IT to internal operations and customer service.

Challenges

- Manual support process inconvenienced clients and consumed valuable employee time
- Delays in opening and closing H&R block stores impacted customers and the company’s bottom line

Results

- Streamlined support processes speeds response times and increases customer loyalty
- Mobile-friendly Field Office Readiness Dashboard tracks milestones for the timely opening and closing of seasonal stores
- Lines of business including HR and Finance are interested in the potential of ServiceNow

H&R Block Canada Streamlines Operations and Enhances Customer Service

ServiceNow empowers H&R Block’s tax professionals and accelerates service delivery

For more than 50 years, H&R Block Canada has helped millions of Canadians with tax solutions to meet their unique needs. They are Canada’s leading tax preparation firm, giving Canadians trusted and affordable tax services.

H&R Block takes pride in delivering the best possible customer service. To do this, they rely on knowledgeable tax professionals, convenient community locations, and the latest information technology. As part of this commitment to service quality, H&R Block invested in ServiceNow to manage their IT infrastructure. However, H&R Block quickly saw that ServiceNow could bring benefits across their entire business. They identified a number of areas where ServiceNow would deliver significant value – ranging from internal operations to customer service – and set about making these opportunities a reality.

Accelerating Frontline Support

The first area that H&R Block tackled was supporting local tax professionals. Each H&R Block location has tax professionals who work directly with clients, supported by a central team of experts. However, when a local tax professional needed support during a client meeting, they had to consult a long list of telephone numbers and then call the right person. They would often be on the phone for 10 minutes or more, inconveniencing clients and consuming valuable time.

H&R Block now uses ServiceNow to streamline this support process – something they call the Block Signal. When a local tax professional needs support – for example, tax legislation advice or instant cashback approval – they simply open a ticket right from the desktop. The support request is automatically routed to the right person, who typically answers within 10 minutes. During this time, the tax professional can continue to work with the client and build the relationship. According to Popowich, Vice President of Information Technology, “We took a standard IT process and applied it in a new way. We’ve transformed the way we support our tax professionals, and we’ve seen enthusiastic buy-in from the business.”

Delivering GREAT Client Service

Next, H&R Block focused on enhancing client service delivery. They embrace an operational service platform called GREAT that addresses five key client service delivery areas – greet, relate, experience, add value, and thank. They have developed a number of KPIs to measure these five areas, using information from in-store systems. ServiceNow collects this information each day from more than 840 stores, creating a GREAT scorecard. Regional directors and district managers can see the overall GREAT score for each of their stores, and can drill into fine-grained KPIs to pinpoint specific issues.

Since creating the GREAT scorecard, H&R Block has significantly increased customer loyalty. Their Net Promoter Score (NPS) – a widely accepted measure of customer loyalty – has increased by 12 points over the two years GREAT has been operational. Popowich says that, “We’ve never seen such a dramatic increase in NPS before. We attribute this directly to the GREAT scorecard. It lets us respond instantly to customer service issues and measure our progress.”

Opening More Than 800 Stores in Three Weeks

Ramping up for the tax season is one of H&R Block's biggest challenges. Starting in January, they open more than 800 stores and kiosks across Canada. Logistics are daunting, with more than 23,000 tasks to complete in just three weeks. At the end of April, all of these locations have to be shut down – generating another 64,000 tasks. Often, individual stores would encounter issues, leading to delayed openings and closings. This created a direct impact on H&R Block's clients and on their bottom line, with some stores opening as late as March.

Now, H&R Block uses ServiceNow to manage this process. They have created a Field Office Readiness Dashboard that tracks 22 milestones for each office being opened. Field staff can update milestone status directly from their mobile devices, creating an instantaneous view of which stores need help. All of H&R Block's opening and closing procedures are also stored in ServiceNow's knowledgebase, giving each location a documented, repeatable process to follow. As a result, an unprecedented 97% of stores opened on time the first year that the dashboard was used.

Momentum Is Building

H&R Block has already begun several other ServiceNow initiatives. For instance, their ServiceNow STARS dashboard tracks the status of critical services that support field operations. They are building additional workflows to automate store opening and closing processes, and are using ServiceNow Discovery to automatically verify that IT equipment has been installed correctly in each store. ServiceNow is also being extended to track store inventories and procure supplies. In addition, HR, Finance and other H&R departments are actively looking into the potential of ServiceNow.

H&R Block stresses that the combination of easy development and business focus is the key reason why they continue to build momentum with ServiceNow. Popowich sums it up this way, “With ServiceNow, we’ve transformed how we engage with customers. We’ve done all of this with just 1.5 full-time technical resources – our business analysts now work directly with our internal business partners to create solutions.”

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