CUSTOMER SUCCESS

Intuit

Proactive Digital Engagement Calculates to a Delightful Experience
Intuit, Inc. sought to delight its customers by building digital engagement into a larger strategy to improve the customer experience. Later, the company consolidated live chat operations and began using transcription and text analytics to optimize the customer experience. As a result, Intuit has achieved a 20 percent improvement in customer satisfaction scores for certain product lines and as much as a 25 percent improvement in conversion rates. The company projects significant additional benefits with the recent deployment of predictive targeting for high-value customers.

Customer experience has been a part of the corporate DNA at Intuit, Inc. since its founding. The company was a pioneer in the use of the Net Promoter Score (NPS), and consistently achieves one of the best aggregate scores among companies of all kinds. The company’s internal mantra is to “delight its customers,” and Intuit’s flagship products have a performance goal of being 10 points higher than its closest competitor.

Maintaining such a large competitive edge requires continual innovation. A 2007 initiative called “Design for Delight” focused on anticipating customer needs and proactively building an experience to meet them. As a part of the initiative, Intuit decided to pilot a digital engagement solution from LivePerson. “We wanted to ‘humanize’ the web experience for our customers,” recalls Norman Happ, who at the time was the director of sales for the Quicken product line and oversaw the testing and implementation of the chat solution. “From that initial pilot, we saw immense value in digital engagement; customers had the ability to both purchase a product and get the right information without leaving the digital channel. Not only did that help drive our conversion rates up, but it also improved our customer experience scores.”

Customer experience drives consolidation

In 2012, Happ became the vice president of sales for Intuit’s Small Business Financial Solutions division and given a charter to transform the telesales channel with a focus on customer experience and product upsell and attach rates. While the LivePerson solution was highly successful, it had been implemented in silos across the company. Happ realized that consolidation of live chat operations would drive better customer service and greater operating efficiency. In total, Intuit maintains more than 140 concurrent agents.

The consolidation program, dubbed the Chat Center of Excellence, started in late 2012 in conjunction with the consolidation of CRM systems. “The ability to pass leads from chat into one centralized CRM and then have the context of all digital and non-digital engagement available to voice and chat agents in real time—regardless of product or business line—will significantly improve our effectiveness,” Happ observes.
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— Norm Happ, VP of Sales, Small Business Financial Solutions, Intuit, Inc.

Broadening digital engagement

With the rollout of the Chat Center of Excellence, Happ’s team is using LivePerson’s chat conversations and text analytics to improve not only chat operations but also website design and content delivery. “In certain instances, the optimal customer experience is to provide self-service capabilities. But in other instances, a live engagement is needed,” Happ relates. Specifically, the team needs to identify and engage high-value customers, at the right time and via the right channel.

For this, Happ’s team deployed the predictive intelligence capabilities of the LivePerson platform, along with an Intuit-patented solution developed by Happ and his team (designated “Adaptive Subscriber Retention Based on Forecasted Retention Value of Paying Subscribers”). “We’re able to compare individual behavior against historical behavioral data and pinpoint customers who aren’t going to purchase regardless of the circumstances, focusing agents on other customers who have a much greater likelihood of completing a purchase instead,” Happ explains. While his team hasn’t gotten far enough into the deployment to quantify results, Happ believes they could be substantial—from higher conversion rates, to larger average order values, to even greater customer satisfaction.

The ROI of a delighted customer

“Our primary focus on digital engagement is on customer experience,” Happ comments. “Getting customers the right information via the right channel is our foremost priority. Obviously, there are related benefits around improved conversion rates, faster sales growth, and improved operating efficiency. But customer experience is at the heart of what we’re trying to do.”

When the chat solution was initially rolled out, Intuit saw customer satisfaction scores for certain product lines and business units improve by as much as 20 percent. “And as we’ve matured our digital engagement models, we’ve seen these numbers improve even further,” Happ adds.

Intuit also saw its conversion rates improve with the 2007 digital engagement implementation. Depending on the product line and business unit, they increased as much as 25 percent.

Company Profile

Founded in 1983, Intuit Inc. is the world’s largest provider of personal and small business finance software—with flagship products QuickBooks, Quicken, and TurboTax. The company’s 8,500 employees serve more than 50 million customers worldwide, and earned revenue of $4.15 billion in 2012.

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Optimizing how we identify and proactively engage high-value customers has the potential to create compelling economies of scale while delivering higher customer satisfaction.

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Looking to the future

When asked about his future digital engagement roadmap, Happ calls out three initiatives for which LivePerson’s text and conversations analytics and predictive targeting will be key: (1) the use of big data for better outbound targeting of underserved customers, (2) enhanced lead scoring, which should drive higher sales growth across multiple channels, and (3) the use of personalized video to provide information in real time.

Happ is also working on a plan for engaging with customers who use mobile devices. “Mobile is something we’re still exploring,” he says. “We’re working to put together a comprehensive understanding of customer behavior and how they want to engage with us on the mobile front.”

Happ asserts that digital engagement is a win-win scenario for both Intuit and its customers. “In addition to being cheaper and more efficient for us, our small business customers and accountants find digital engagement more advantageous,” he asserts. “They can multi-task while they are getting their questions answered or problems resolved.”

About LivePerson

LivePerson, Inc. (NASDAQ: LPSN) offers a cloud-based platform that enables businesses to proactively connect in real-time with their customers via chat, voice, and content delivery at the right time, through the right channel, including websites, social media, and mobile devices. This “intelligent engagement” is driven by real-time behavioral analytics, producing connections based on a true understanding of business objectives and customer needs. LivePerson is headquartered in New York City with offices in San Francisco, Atlanta, Tel Aviv, London, and Melbourne.

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