



# Intuit

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## The Organization

Intuit's mission is to Power Prosperity Around the World. Its global products and platforms, including TurboTax, QuickBooks, Mint, and Turbo, are designed to empower consumers, self-employed, and small businesses to improve their financial lives, finding them more money with the least amount of work, while giving them complete confidence in their actions and decisions. Intuit's innovative ecosystem of financial management solutions serves partners and 46 million customers worldwide, unleashing the power of many for the prosperity of one.

Intuit recently introduced TurboTax Live for the millions of taxpayers who want help from credentialed tax experts to do their taxes. TurboTax Live consists of an extensive network of thousands of credentialed tax experts who are ready to help people file their taxes with confidence. Experts are available on-demand via one-way video throughout the TurboTax assisted tax preparation experience to not only provide personalized advice and answers, but also a one-on-one review of a customer's tax return – including the ability to sign and file if needed – giving taxpayers the confidence that they are getting the biggest refund they deserve, and their taxes are done right.

## Motivation for Change

Throughout the year, Intuit experiences incredibly busy periods that require them to quickly ramp up their customer service agents, tax professionals, and their TurboTax Live professionals. Because of these fluctuations, Intuit needed a tool that could help with reporting, forecasting, and staffing, in order to ensure that they had agents available when they needed. Not only did Intuit want a tool that could garner insights across the different departments, but they also needed one that would seamlessly integrate with their other technology partners.



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## Desired Solution

Intuit needed to find a workforce optimization solution that could help them meet three objectives:

1. Give flexibility to Intuit's growing workforce of Customer Success agents and credentialed tax professionals.
2. Stay on top of their staffing during such an extreme seasonal environment
3. Provide insights into what is happening on a day-to-day, hour-by-hour basis, to allow them to adapt to future trends quickly.

Intuit needed to find a solution that would provide Customer Success agents, tax pros, and the company with flexibility and ultimately lowers cost.

*“The upgrades have made it easier for me to quickly identify what I need, build custom filters to pull reports, and provides me with tons of data to truly see what is happening on a daily basis. Ultimately, the intuitiveness of Aspect WFM has helped free up my time allowing me to focus on planning.”*

– Tabitha Ortega, Senior Schedule Analyst, Small Business and Self Employed Group at Intuit

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## Why Aspect

Intuit found that the Aspect® Workforce Management™ (WFM) solution not only could help them exceed their outlined objectives but was also customizable and could easily integrate with their additional partners.

Having been a long-time partner, Intuit was also impressed with the upgrades they had seen over the past 15 years. Aspect WFM continually evolves and what had once been a manual process is now a customizable solution with new features, filters and seamless integrations.

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## The Results

The specifics:

- **Schedule exchange:** Get schedule updates from partners, which are critical to understand real time staffing numbers.
  - See overall health of the business and what Intuit needs to target for their tax pros from a scheduling standpoint.
- **Workforce optimization:** Schedulers, analysts and managers have tools that are more easily accessible, which enables them to make real time decisions and deliver better business outcomes.
- **Scheduled callbacks:** Enable an awesome customer experience that allows customers to select available appointments with an agent or tax professional. Intuit uses Aspect Web Services in the back-end scheduling system that supports appointment management for the scheduled callback experience.

Intuit values providing an awesome agent experience and quality service for customers. They believe that by giving their Customer Success agents and tax pros the best tools possible, the agents and tax pros, in turn, would be able to provide a better customer experience.

**“Aspect WFM gives us forecasts and capacity plans so we can optimize our staffing across our partners and give our agents optimal schedules as well.”**

**– Andrew Kennedy, Product Manager at Intuit**

Aspect® Workforce Management™ (WFM) performs a few critical functions that Intuit finds essential and is the infrastructure that helps the company enhance agent experiences. On the backend, Aspect WFM helps convert their volume forecast into their capacity requirements allowing Intuit to plan in sophisticated ways. By using Aspect WFM, Intuit can ensure that they are staffed properly from a capacity and able to plan for potential future trends.

Aspect WFM also provides the interface that gives Customer Success agents, tax pros, and their managers greater visibility into what is going on with their teams in real time. Since Intuit also views their agents and tax pros as customers within a double-sided network, the company believes in giving them an awesome experience. This includes of a well-organized and less chaotic work environment that is attractive to workers who want flexible schedules to enable better work/live balance.

Intuit has had huge success recruiting, onboarding, and training talented Customer Success and tax professionals who want to work for a shorter period and flex hours. Looking forward, Intuit sees a big opportunity with the gig economy and believes Aspect WFM will play a role in helping them tap into its highly skilled, on-demand workforce. Intuit wants to tap into the best talent in United States and Canada and to do that they must offer scheduling tools that are flexible and allow agents and tax pros to prioritize their work around their life. When Intuit experimented with flexible scheduling, it allowed them to hire more talented people and meet their business needs with greater success. Aspect Software’s WFM solution is helping Intuit transform what scheduling means in the future.

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#### **About Aspect**

Aspect helps enterprises break down the walls between people, processes, systems and data sources, empowering organizations to unite around the customer journey. Our customer engagement center offers native **interaction management, workforce optimization** and **self-service** capabilities that drive dynamic, conversational interactions and create a truly frictionless omni-channel customer experience. Leveraging all the benefits of the cloud and over 40 years of industry ingenuity, Aspect conveniently and easily connects questions to answers while helping enterprises keep service levels high and operational costs contained. For more information, visit [www.aspect.com](http://www.aspect.com).

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