



Delivering optimal results during peak tax volume on demand

Business Challenge

Every year from January to April, millions of people complete their tax returns.

The #1 best-selling tax preparation software company offers a variety of tax support products that require qualified customer service resources. This client relies on trusted partners to meet customers where they are in their tax journey, while maintaining proven performance. They needed a customer care partner who could deliver service level at scale through the peaks of tax season, while providing flexibility on days with less demand.

Solutions

Flexibility that delivers excellent customer experiences when needed

The client was able to maintain business continuity when call volume peaked, specifically during three key times of the year (January, April, and October). The VirtualFlex model allows the client access to certified agents across the U.S. allowing for coverage across all time zones.

Outcomes

- Exceeded over 100% staffing goals during four consecutive quarters
- Delivered 152% more hours during peak season, year over year

Partnership and communication

Clear lines of communication were set up from the start so the client was able to quickly relay needs to the Liveops team. Within hours, Liveops agents were available to meet expected call volume and ensure customer interactions were handled efficiently.

Outcomes

- Liveops Learning and Development team collaborated with client operational leadership to deliver effective learning modules that resulted in agents meeting or exceeding planned KPIs, including Issue Resolution, Transfer Rate and Average Handle Time
- In 2022, Liveops rostered and certified 32% more agents than the previous year, allowing more flexibility to client when needed, yielding 84% more volume allocation

Cost efficiencies for productive time

Given the peaks and valleys of volume throughout the tax season, the client saw optimized costs by only paying for productive time with the Virtual Flex model. The model allows access to a large network of qualified agents for the busiest times of the year, and maintains a lower agent count during the off-peak times.

Outcomes

- Exceeded NPS scores by delivering 6 points above plan
- For FY22, the VirtualFlex platform delivered more than 25% savings vs. Other BPO partner talent model

2023 Highlights

- Through first peak, Liveops outperform all partners in operational achievement with NPS score of 68 (5 points above network average), while delivering 18% over locked hours
- Overdelivered staffing expectations by 119%
- In second peak, Liveops was the only partner to meet and exceed required hours (13% over required, and 48% more hours than same time period in 2022).
- Throughout peaks and steady-state, Liveops has met all client KPIs, continually performing in the top three of the partner network