

CUSTOMER CASE STUDY

Full-Service Tax Firm Pays Efficiencies Forward to Improve Customer Experiences

Taxes are widely regarded as one of the most complex necessities in life, leaving some individuals and businesses with tax burdens they can't manage or afford. That's why Community Tax receives well over 1,000 leads per day for help with tax preparation and resolution. But to deliver on their belief that "Life's too short to worry about taxes," Community Tax must be able to ingest data from every call, form, and inquiry they receive to make the customer journey fast, efficient, and positive. As co-founders and partners, Nick Charveron and Jacob Dayan are the "idea guys" who are constantly thinking about improving the customer and user experience to create greater efficiencies and scale the business.

But after spending two years and too much money on a CRM system that never got off the ground, Community Tax still needed a platform that was not only customizable to their specific use cases, but that could pave the way for future growth.



CommunityTax

Industry ///

Financial Services

Location ///

Chicago, IL

Website ///

www.communitytax.com

Finding the Right Fit

Nick and Jacob were less interested in solving a micro-level need for efficiency in sales and marketing and more interested in implementing an end-to-end system they could run their entire tax service company on. Every day, one client is touched by eight to ten different departments, each with their own robust processes and sometimes simultaneously. The Community Tax team knew they could cut a vast amount of manual work to process applications by finding an end-to-end solution that would free up their teams from busywork, eliminate blindspots when processing applications, and empower users to deliver the best customer experience. But they felt that enterprise-level platforms were too app-heavy, creating confusion about what they would get. [SugarCRM](#) provided the level of customization Community Tax needed to serve the best interests of their company and customers.

“Given the tax resolution industry is a very niche industry, we were going to have to customize any platform we used to be a full end-to-end solution, and Sugar gave us the best opportunity to do that,” said Nick. “To deliver quality service on a nationwide scale, data and interoffice communication and processes have to be on point.”

Community Tax engaged with Sugar solution partner [Nablasol](#) to execute their vision. With automated workflows as a top priority, the Community Tax team sought to improve the experiences of both customers and internal users through greater efficiency.


Building Automated Efficiency

The customer journey at Community Tax is a high-touch process consisting of marketing and lead management; initial screening (sales); approval and enrollment; billing and financing; investigation; tax prep; resolution; and ongoing monitoring. With greater visibility and integrated data across all these touchpoints, Community Tax employees can now provide better customer service at every stage and keep the client engaged throughout the process.

For instance, in a typical sales process, a simple contract might require several manual inputs, PDF generation, emailing, and long cycles with the customer to ask questions and arrive at a finished contract. With Nablasol, Community Tax has designed a simpler, more engaging process that uses a custom application to search for a case number, which auto-fills the required fields and emails the customer with a secure link to sign — all while sales is still on the phone. And because the customer is still engaged, reps can help

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answer any questions or technical needs in real time. Today, 80% of Community Tax's total client enrollment is completed same-day. And in some cases, Community Tax is able to close business on the first call.

Community Tax can also pre-qualify customers from one platform instead of manually processing applications across five or six systems — and it takes fewer employees too. Whereas the company previously needed four employees to manually review applications, compare lenders, and select one, integrated third-party apps now calculate values based on input data, automatically pre-qualifying a candidate for a specific lender. Now, the department only needs two people to perform the function despite the business doubling in size.

Nablasol helped automate these various cumbersome processes using intuitively designed workflows inside SugarCRM. In doing so, much of the manual work Community Tax was accustomed to was eliminated through the use of third-party systems that are fully integrated with the platform. From unified communication integration (wherein users can call, text, and email clients) to having a fully integrated payment processing and tracking system, Community Tax can now accomplish everything from a single system that streamlines the entire process.

“Automation helps our users enjoy their jobs better because they have less to do manually,” said Nick. “They can click one button and knock out five tasks.”


All for the Customer Experience

The true benefit of automation is that it ultimately improves the customer experience. When faced with stressful tax burdens, the last thing Community Tax customers want is to navigate a confusing telephone system or get transferred multiple times. By integrating their phone system with Sugar, Community Tax can use caller ID to identify the client ahead of time, determine what stage they're in and who they've already talked to, and route them directly to that employee.

The Community Tax team knows that impeccable customer service means being timely and consistent on a nationwide scale, especially as more jobs are being done remotely. That's why intra-office communications have to be on point while maintaining better visibility of the entire client experience. With its entire business on

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Sugar, Community Tax has macro-, departmental-, and user-level visibility of the entire client lifecycle. And as the company's digital transformation partner, Nablasol played a crucial role in building that journey for the ultimate customer experience.

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Going forward, Community Tax plans to extend its use of Sugar to capitalize on ancillary uses for cross-selling and revenue growth. "What I like about Sugar is how much room we have to grow and become more efficient over time. With Sugar, we feel the scale is unlimited."



SUGAR PARTNER

Nablasol helps companies build meaningful relationships with their customers using technology. They connect with companies as strategic business partners to develop a people-first approach for digital transformation. They empower businesses to create value for their customers and become distinct in their industry using digital customer experience. They do so by providing them with technological expertise, customer insights, & business strategy.

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About SugarCRM

SugarCRM is how marketing, sales, and service teams finally get a clear picture of each customer to help businesses reach new levels of performance and predictability. Sugar is the CRM platform that makes the hard things easier.

Thousands of companies in over 120 countries rely on Sugar to achieve high-definition CX by letting the platform do the work. Headquartered in Silicon Valley, Sugar is backed by Accel-KKR.

To learn more visit www.sugarcrm.com or follow [@SugarCRM](https://twitter.com/SugarCRM).