



CURRENT AUDIENCE DRIVES NEW CLIENT GROWTH

H&R Block Reverses a Negative Sales Trend Through a Deeper Understanding of Audience

THE CHALLENGE

H&R Block was under threat from primary digital competitors—Turbo Tax and others. H&R Block did not invest in online tax submission software and we're losing low income customers—their major business block.

We were tasked with **boosting revenue in the first month of tax season** that accounted for **more than 60% of total tax revenues**.

Revenues during this period had fallen for several consecutive years.

THE STRATEGY

Instead of the “spray and pray” corollary that H&R Block had undertaken in the prior years—essentially trying to outspend their free competitors—we persuaded them to look inward to have a better understanding of their primary client base during the critical first month of tax season.

In doing so, we discovered a few key truths:

- › H&R Block's male-centric advertising was missing the mark... and badly. Nearly 65% of early tax filers were women.
- › Providing an economic incentive to alleviate tax return anxieties nearly quadrupled walk in traffic—and this incentive not only was fully recoverable, but a profit center
- › Return business was more than 3X higher when certain thresholds of service were undertaken



THE WIN

After years of hemorrhaging customers to their no-cost competitors, H&R Block came out of the gates with both targeted messaging to their primary cohort—single women with children in the home.

Further, the offer reflective of their targets' buying propensity was aimed directly at their targets' priorities.

Channel selection for media buy was no longer exclusively focused on male outlets, but more staggered to include their target's media consumption preference.

THE RESULTS

For the first time in multiple tax seasons, **H&R Block experienced a stop in revenue outflow**.

This correlated to a **YoY gain of more than 4%**—a huge figure in a very mature market.

H&R Block has **adopted this strategy for outreach** in subsequent tax seasons.