

H&R Block Accelerates Call Center Agent Onboarding And Improves Customer Service With Mursion

“Fundamentally, our employees were doing all of the things we wanted them to do...but there was something really missing in our customer interactions. There wasn't a human connection, so we had to make the focus [of our training] on empathy”

- Kim Iorns, Director of Leadership and Learning



H&R Block is an 80,000 employee tax services provider, with over 12,000 company-owned and franchise retail locations in all 50 states, Puerto Rico and other U.S. territories, and on U.S. military bases around the world. An H&R Block branded retail office is located within five miles of most Americans.

Challenge

H&R Block is a large enterprise that prepares 23 million tax returns annually. Every year, H&R Block faces the challenge of onboarding new tax professionals in their call centers throughout the tax season. By leveraging business process outsourcing vendors, H&R Block is able to hire 5,000+ new call center agents every season, with 1,600 hires joining in the second half of the tax season.

These late-season hires traditionally underperform earlier hires across all KPIs. Late season hires are generally entry-level employees hired through a 3rd party staffing agency, with no previous experience working for H&R Block. Late-season tax questions are also usually more complex and emotionally charged than questions earlier in the tax season, and new call center agents are less experienced in customer service.

Reliance on inexperienced frontline employees makes it challenging for H&R Block to deliver a consistent, empathic, and high-quality customer experience. Further, the underperformance of late-season

- ✔ Saved 4119 hours of handling time
- ✔ Cut Talk Time by 17.31 seconds and Hold Time by 55.8 seconds
- ✔ Improved Issue Resolution by 3% and Customer Effort Scores by 1.46%
- ✔ Improved employee confidence and customer satisfaction
- ✔ Saw 131% ROI from Mursion

Onboarding late in the tax season had failed to adequately address the lack of on-the-job learning which drives the success of earlier hires



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hires drives up costs associated with increased handling times, hold times, and talk times. Survey data also indicated that costs and revenue loss associated with customer retention and satisfaction may be significant: 33% of American consumers consider switching service providers because of a single instance of poor customer service, and 90% of American consumers are also willing to pay premiums for exceptional service.

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To summarize, H&R Block wanted to:

- Prepare late-season hires to be customer-ready on day one
- Reduce Talk Time, Hold Time, and Handling Time
- Improve Issue Resolution and Customer Effort Scores
- Equalize performance between early hires and late-season hires
- Deliver a consistent, empathic, and satisfying customer experience

Solution and Results

H&R Block evaluated a number of strategies to try and improve call center performance and chose to partner with Mursion because of Mursion's expertise in driving behavior change through personalized simulations. The Mursion team built a suite of custom onboarding simulations designed to strengthen call center agents' on the job confidence, empathy towards clients, and core competencies around issue resolution. Mursion then coordinated with H&R Block's vendors to deliver a series of three custom workshops and simulations to 1,600 late-season hires, working in parallel to H&R Block's facilitators and classroom instructors.

H&R Block was able to save 131% of their spend with Mursion by reducing handling time by 4119 hours and reducing both hold and talk times. H&R Block also saw improvements in agent scorecards across Issue Resolution, Customer Effort Scores, Customer Satisfaction, and other metrics to which H&R Block does not attribute economic impact. H&R Block's data on the performance of their call centers demonstrated that less than two Mursion sessions lead to an improvement in performance equivalent to 3 months of on the job learning, fixing the performance gap between early and late-season hires.

~94% of call center agents surveyed indicated that their Mursion simulation taught them skills that they will use on the job, and 70% of call center agents surveyed said the simulations made them feel more confident when starting their job.