

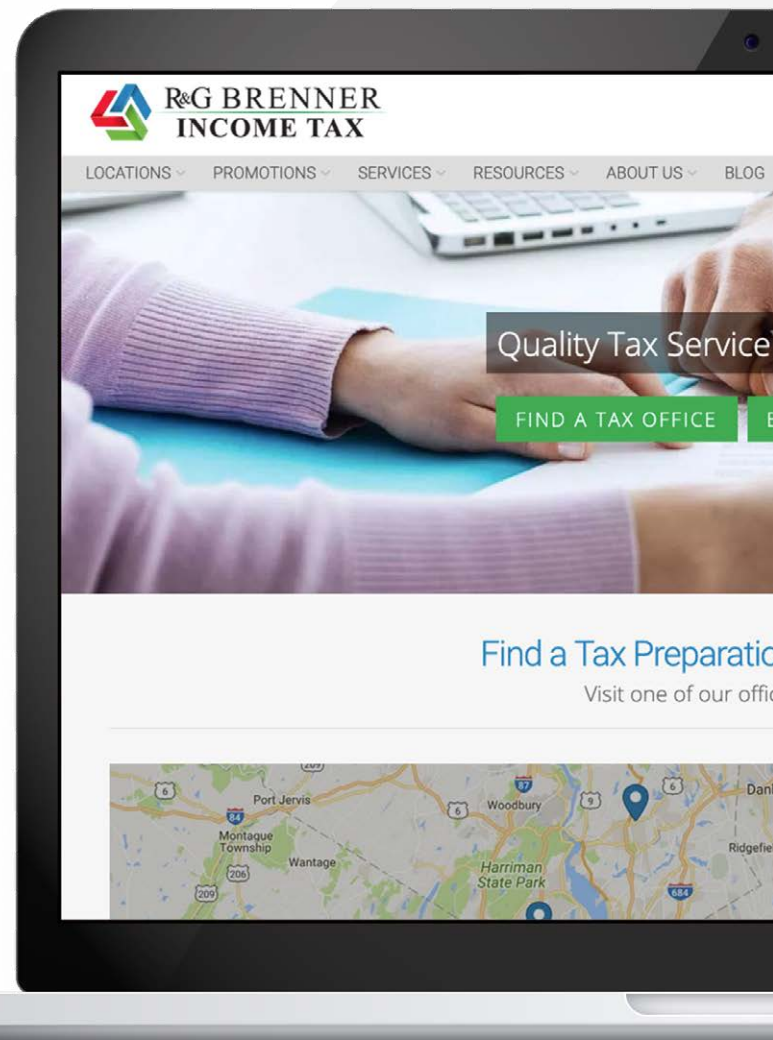
# How R&G Brenner Scaled Appointment Management to Support Busy Tax Season

with Coconut Software

## Overview

### R&G Brenner Income Tax

R&G Brenner, a New York-based 28-office tax preparation firm was looking to implement a smoother, more client-friendly process to book appointments with tax preparers. Founded in 1941, R&G Brenner has prepared millions of personal and business tax returns for over seven decades.



## Challenge

# Making it easier for customers (and internal teams) to book appointments

Prior to implementing Coconut Software, R&G Brenner's appointment scheduling process was cumbersome for their internal customer service team, for tax preparers, and for customers. This became most evident when appointment volume scaled exponentially during peak tax season, the process issues compounded, resulting in more pronounced customer experience and branch issues:

- Clients would call customer service to book an appointment, or submit an online form via the website.
- The Customer Service team would take the request, then check in with the local tax preparer to determine calendar availability.

- After some back and forth between Customer Service and the Tax Preparer, the Client would finally receive confirmation of the appointment time.
- When Clients needed to book last-minute appointments under the time crunch for tax deadlines, waiting that long for appointment confirmation was inconvenient for all parties involved.

Marketing Director Kermit Uregar had been at R&G Brenner through one chaotic tax season, before he started looking for an appointment management solution that would make it easier to book appointments, for both their customers and their internal team.

The screenshot shows a laptop displaying the R&G Brenner Income Tax website's appointment booking form. The form is titled "Enter your details" and is divided into several sections:

- Location:** Selden
- Service(s):** Business Setup or Dissolution Service
- Staff:** Amy Runnalls
- When:** Thursday April 18, 2019 9:00 AM (EDT)
- Your Details:**
  - First Name \***: eg. John
  - Last Name \***: eg. Doe
  - Email \***: eg. john.doe@example.com
  - Mobile \***: eg. (555) 555-5555
- How many Tax Returns will be prepared at this appointment? (Please Note: If you are having more than 1 return prepared, choose a slot where you could book an additional appointment after it.) \***
  - 1
  - 2
  - 3 or more
- Additional Attendees:** + Add Additional Attendee
- Notes:** Please provide us with any additional information you would like us to know ahead of your appointment.

At the bottom of the form, there are two buttons: "Back" and "Book appointment".

## Solution

# Implementing Enterprise Appointment Management, Just in Time for Tax Season

Once Mr. Uregar had evaluated a few options and decided to implement Coconut Software's appointment management solution, the pressure was high to roll out the new technology just in time for their upcoming tax season. But with the help of the Coconut Software team, the implementation went smoothly and the Marketing Director was comfortable with the support he received to ensure that tax preparers were trained.



## Onboarding Internal Teams on the New Platform

To onboard and train tax preparers and other internal teams, Mr. Uregar created a short overview video and presented to the team during a yearly seminar that took place before the beginning of tax season. As team members began to use the platform, Coconut Software's support team was available and responsive to resolve any hiccups.

## Increasing Adoption of Self-Service Appointment Management with Customers

To encourage clients to adopt the new process of booking appointments, Mr. Uregar made sure that a 'Book Appointment' call to action was included front and centre on the R&G Brenner website. To drive more appointments through digital channels, the Marketing team also added links to signature blocks in tax preparers email signatures, and sent out a text campaign. Now, clients can follow this simple process to book an appointment:

- Visit website or email signature block and click "Book Appointment" link.
- Clients are directed immediately to the Coconut Software appointment management platform to book an appointment online.
- Clients are prompted to enter the service desired and will see times and dates available with the tax preparer at the location closest to them.
- Appointment confirmation and reminder emails are sent to Clients immediately after booking, to provide a reference for appointment time and location and to help reduce no-shows.

## Results

# Managing Appointment Workflow and Making Data-Driven Business Decisions

Since implementing Coconut Software, the tax firm has greatly improved appointment booking ease for both the client and for the tax preparer.

With real-time visibility into appointment volume, The R & G Brenner executive team can now better plan employee staffing and reallocate available resources to high-volume locations to help manage walk-in traffic, which is critical during tax season.

Mr. Uregar now depends on insights from Coconut Software for his weekly executive team meetings; for example, what times and services are trending at

different points in the year. He also tracks the results of different appointment campaigns through Google Analytics, which he expects will deliver more insights for better marketing decisions in the future.

Looking forward, R&G Brenner is investigating into a potential integration between their proprietary Revenue Management Solution and Coconut Software which would help deliver an even more comprehensive view of appointment performance across locations, layered with sales and revenue metrics.

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*Coconut Software has not only created freedom and ease for our clients to book appointments with us, but also has created time for our team, since we've significantly decreased the time it takes for us to manage appointments internally.*

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**R&G BRENNER**  
**INCOME TAX**

**Kermit R. Uregar**

Director of Marketing,  
R&G Brenner Income Tax

## About Coconut Software

Coconut Software is transforming how financial institutions engage with their customers by allowing them to effortlessly manage on-demand and pre-booked appointments with real-time insights to optimize results. Working with financial services, like Jackson Hewitt, First West, Connect First, and RBC, we understand that your enterprise scheduling needs are complex and we are committed to delivering a premium experience to each of our valued clients.

Visit: [coconutsoftware.com](https://coconutsoftware.com) or call 1-888-257-1309