



Background:

Jackson Hewitt is one of the top consumer-focused tax preparation providers in the United States. Its goal for 2017 was to increase the number of new customers after multiple years of declining growth.

The Challenge:

Jackson Hewitt’s leadership challenged the marketing team and agencies to substantially grow new customer acquisition during the 2017 Tax Season. The difficulty of this challenge was increased by the fact that the IRS announced that it would not release tax refunds until February, meaning that the company’s core demographic no longer had an incentive to file early. Jackson Hewitt created a Tax Refund Advance product to counteract this delay, but it was unknown how “early filers” would react to the delay and the Refund Advance product.

Our Solution:

- › In order to focus search spend on new users, Path asked Jackson Hewitt to create segmented customer lists that we could exclude or target in paid search. Our plan was to exclude all customers from the 2016 tax season, and also bid higher and change messaging for previous customers who had not used Jackson Hewitt in 2016.
- › Our first step was to join numerous calls with Jackson Hewitt’s legal team, which had prevented the use of customer match in prior years. Path’s team was able to work with Jackson Hewitt’s new CMO to provide the legal team with the information it needed to give the green light to customer match.
- › Once the audiences were uploaded to AdWords, Path created a multi-tiered account structure that focused spend on consumers who were searching for Jackson Hewitt’s most valuable keywords and were highly similar to Jackson Hewitt’s best customers.

RESULTS

- ▶ As a result of Path’s audience targeting and budget tiers, Jackson Hewitt blew away its goals with **double digit new client growth, and outpaced the IRS’ growth** in terms of number of taxes filed.
- ▶ **Paid search was the most effective** of all Jackson Hewitt’s channels, and Jackson Hewitt reacted by almost tripling the paid search budget during tax season.
- ▶ Lastly, Jackson Hewitt took share from major competitors throughout the tax season.