Current Outlook

Same Thoughts
Each year we assist many individuals with their tax return. We hear a lot of information about people's lives, their challenges and what they're hoping to achieve for the coming year.

Same Choices
We listen to what they have to say and provide some advice for the next 12 months. We choose to sell our tax service only.

Same Behaviours & Feelings
We complete their return and then correspond via email or phone if we have any queries. Once it's done we don't see them until next year.

Same Experience
Each year we have a very similar experience with this type of client. They tend to make only one purchase annually and while the fees are generally not high, they are a profitable segment.

Same Feeling
We feel we provide a good service but it's one-dimensional

New Outlook

New Thoughts
The financial coaching service we offer to our business clients could be modified to benefit individuals who are currently only purchasing our tax service.

New Choices
We provide extra value to our individual tax clients by inviting them to join a program we have previously reserved for business owners. It includes a minimum of six coaching sessions each year.

New Behaviours & Feelings
We're adding value because we know the coaching service helps most of our clients. When we offer the service, clients are responding very positively with a number of them taking it up.

New Experience
About one in four clients is opting in to the coaching service. They've now become their own target segment and there is further scope to offer them other services.
The clients who don't take it up are also providing us with valuable comments about what else they might like to access in addition to the current tax service.

New Feeling
We feel like we're really helping transform these people's lives by giving them further assistance to reach their financial goals.