

## Case Study

# H&R Block Preps for Company-Wide Social Media Outreach

There's nothing quite like tax time to set people on edge; not only do we potentially have to shell out money to our government, but it's a slightly nerve-wracking process making sure our paperwork is filled out and filed properly (let alone figuring out what tax laws apply to us).

**H&R BLOCK®**

We all feel the pain of taxes, and [H&R Block](#), one of the world's largest tax preparation services, is poised to ease some of that pain by offering up the expertise of their tax advisors to the greater online community. But how do you mobilize thousands of experts to get chatting in such a highly regulated industry? It may not be an easy feat, but Director of Social Media Zena Weist and her team are happy to take on this challenge.

## The Mission

H&R Block's goals for social media engagement are simple: Field and answer product inquiries and company-specific questions, and contribute expertise and advice to the larger online community discussion regarding all things tax prep. Unsurprisingly, the simplicity of those goals understates the work it'll take to achieve them.

Already headed down the social road, H&R Block has established a community called the [Get It Right Community](#), where people can post questions and get advice from one of the company's many tax advisors. Thousands of people have already joined, but not all tax-related questions and comments are asked within these community walls; a good portion of the larger conversation lives outside the H&R Block community on a variety of touch points that need to be monitored regularly. Weist and team have been tasked with finding these separate conversations happening outside the H&R Block community, observing the trends of those conversations, and creating a strategy to get involved on a company-wide scale.

## How Are They Scaling?

With hundreds of field offices and thousands of employees, how does a company this big scale social media outreach? Weist's team was created and is structured to thread together all the various-company based activity on the social web, and keep things as organized and cohesive as possible. To get analogous, H&R Block's social media team is the hub for the company's social web initiatives, and the various offices and employees involved are the spokes.



The H&R Block social media team consists of four people, including Weist, who oversee the company's Get It Right Community, own and manage its various social media outposts and partner initiatives, make sure the content H&R Block produces is fresh and relevant to the overarching online conversation, and work to establish a more social form of customer service.

Because of its fairly small size, the social media team at H&R Block relies heavily on its internal partners, and on the unusual but celebration-worthy buy-in from company executives. To some degree, that corporate buy-in and organization-wide enthusiasm for using social media to share company expertise make it easier to keep the hub small and still remain effective.

## Why Radian6?

Weist emphasizes that the long-term goal for H&R Block is to shift from a reactive response effort to a proactive one in which they'll be able to anticipate and answer questions before people run into serious issues that get them nervous or upset. Taking into consideration this long-term goal, Radian6's [trend analysis capabilities](#) and [workflow functionality](#) make the platform a perfect fit for H&R Block's purposes.

The [Engagement Console](#) will also be an integral piece of H&R Block's monitoring and engagement strategy, as the company's customer service team will be able to tag, assign, and respond to comments and questions around the web quickly and without confusion to keep conversations moving. With the Engagement Console, the executive team will be able to review online content relevant to them without having to get heavily involved in the nitty gritty of sifting through posts or managing responses.

## What's Next?

Because H&R Block is in a heavily regulated industry, the company can only do so much with the social graph information they'll have access to from their online interactions. Working within these regulations makes future planning for these channels limited until tax laws change, but that won't keep H&R Block from doing all it can to optimize its use of the social web to help people and build brand reputation.

While Weist and team have quite the task list to manage in the months to come, they have a winning combination of support from their organization and the drive to be the go-to resource for tax preparation, both on- and offline.