

Project: End of Year (EOY) Communications Campaign

Summary

The End of Year (EOY) comms campaign was designed to deliver clear communications to clients about EOY deadlines and equip clients to complete the necessary EOY tasks for closing out the year successfully, such as making final payments, recording tax details, and other administrative duties. The campaign aimed to reduce the number of outreach requests and escalations to the Customer Support Team by proactively educating clients about EOY deadlines and required actions.

The campaign involved collaboration between several internal teams, including Customer Support, Tax, Payroll, and Business Operations, to establish clear deadlines, create the campaign copy, and develop a comprehensive email strategy. By providing timely reminders and instructions, the campaign helped clients understand their year-end responsibilities, resulting in reduced client outreaches and the successful closure of the tax year.

Project Background

At the end of each year, businesses must complete several important tasks to ensure their payments and taxes for the year are correct. These tasks include submitting final payments, completing tax filings, reconciling accounts, and preparing year end forms. However, many clients are unaware of the tasks they need to complete and/or the deadlines for EOY tasks, resulting in a high volume of last-minute outreaches to the Customer Support Team and, at times, failure to record payments in the correct tax year and/or late tax filings and penalties. This both puts additional strain on internal teams and risks clients failing to complete essential tasks.

The goal of the EOY comms campaign was to proactively educate clients on EOY tasks, guide them through the action items, and lessen urgent support requests, ultimately streamlining the EOY process for clients and improving the workplace environment for internal teams.

Primary Goals

1. **Minimize Client Outreach and Escalations:** Reduce the volume of client inquiries and escalations to the Customer Support Team by providing clear, timely, and actionable communication about EOY tasks.
2. **Increase Client Compliance:** Ensure that clients complete all necessary year-end actions (payments, tax filings, etc.) on time to avoid penalties and delays.

3. **Educate Clients on Key Dates and Deadlines:** Provide clients with a detailed schedule of important EOY deadlines, so they are fully aware of the actions they need to take and when.
 4. **Streamline Internal Communication:** Coordinate efforts between multiple internal teams to ensure that all deadlines, communication plans, and client actions are aligned and on track.
 5. **Efficient Tracking of Campaign Progress:** Develop an internal system to monitor campaign execution, track client responses, and identify areas for improvement.
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Method

This project used a multi-step process, involving coordination across several internal teams and strategic communication planning. Below are the key phases of the project:

1. Internal Collaboration and Deadline Establishment

- **Stakeholder Meetings:** The EOY comms campaign manager held meetings with key internal teams (Tax, Payroll, Business Operations) to determine the critical tasks clients must complete before the end of the year.
- **Setting Deadlines:** Internal and external deadlines were established for each task (final payments, tax account information entered, end of year forms available). These deadlines informed the text of the comms campaign.
- **Client Segmentation:** The team segmented clients based on the types of services they used throughout the year and who needed to receive which EOY comms.

2. Developing the Communications Plan

- **Email Timeline:** A detailed timeline was created for when each communication would be sent to clients. The timeline accounted for the urgency of each task, starting with early reminders and escalating to more urgent notifications as deadlines approached.
- **EOY Checklist:** The EOY comms campaign manager compiled the information gathered from meetings and interviews with internal team members to create an EOY Checklist for clients. The [EOY Checklist was published in the Help Center](#) for accessibility.
- **Message Creation:** The campaign manager wrote clear and concise email copy that featured the EOY Checklist in each email. The content was designed to be clear, simple, and effective for clients.

3. Building the Audience List and Email Execution

- **Audience Segmentation:** Using a redash query, an audience list was built for each email in the campaign. Clients included as comms recipients were those still live on the platform and terminated companies that had opted in to Justworks Payroll still filing their year-end taxes.

- **Scheduling Comms:** The campaign manager worked with the marketing automation team to ensure that the emails were sent on the correct dates to ensure clients received timely reminders.

4. Customer Support Coordination

- **Customer Support Coordination:** Customer Support teams were trained on the campaign timeline and key messages so that they could provide consistent and knowledgeable support to clients who had questions.
 - **Internal Resources:** A clear internal resource compiling the EOY comms text, audience lists, send dates, and relevant notes was created for Customer Support teams to consult when needed.
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Results

The EOY comms campaign achieved the following results:

1. Reduced Client Inquiries

- The number of outreaches to the Customer Support Team and escalated client requests during end of year decreased significantly from the previous year when no EOY comms campaign was run.
- When surveyed for feedback, clients reported appreciating the proactive communication and timely reminders about essential EOY tasks.
- Clients also expressed a greater understanding of the EOY process and felt more prepared to complete their tasks.

2. Increased Timely Task Completion

- A notably higher percentage of clients who received the EOY comms campaign emails completed all necessary EOY tasks by their respective deadlines, compared to the previous year.
- Clients had fewer late tax filings and late payments, resulting in less penalties and greater client satisfaction.

3. Improved Internal Collaboration

- Internal teams worked together more smoothly and efficiently due to the shared understanding of EOY task deadlines.
 - The Customer Support Team was able to set clear expectations with customers thanks to timelines established by internal teams.
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Conclusion

The EOY Comms Campaign successfully met its objective of educating clients about critical EOY action items and deadlines, significantly reducing the volume of customer support interactions and minimizing escalations. By proactively reaching out to clients with well-timed and informative emails, Justworks Payroll was able to improve the year-end client experience and ensure that tax filings, final payments, and administrative tasks were completed on time.

This project demonstrated both the effectiveness of a well-structured comms campaign and highlighted the importance of internal team collaboration to ensure smooth execution. The success of this EOY comms campaign will serve as a template for future client communication strategies, particularly during critical points of the year.