

CASE STUDY

TurboTax Offers Loyal Customers a Tailored Experience With Customer Match



When it comes to taxes, people want them done right—and they want to get the biggest refund they deserve. [TurboTax](#), a leader in online tax preparation, makes this possible by letting people effortlessly prepare and file their taxes online.

With millions of loyal customers returning each year, TurboTax wanted to make it even easier for these customers to get started online. The brand turned to Google's [Customer Match](#) (CM) to help reengage these customers with tailored search ads and landing page experiences across desktop and mobile.

TurboTax helps loyal customers find what they're looking for

TurboTax knows from experience that the more it's able to recognize a returning customer, the better it can personalize that customer's experience and help them complete their taxes. With CM, TurboTax was able to tailor ad copy and landing pages specific to customers returning on their first visit of tax season.

For example, to reach previous TurboTax customers, the brand used "sign in" as a call to action in ads, and it used landing pages with prominently placed login fields—making it easier for returning customers to start filing their taxes.

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About TurboTax

- TurboTax is the #1 best-selling online tax preparation service that allows customers to easily prepare and file their taxes online.
- Mountain View, CA
- <https://turbotax.intuit.com/>

Goals

- Drive more conversions
- Improve cost efficiency
- Create tailored customer experiences

Approach

- Used Customer Match to customize ads and landing pages for existing customers
- Re-engaged customers on mobile

Results

- 14% increase in click-through rate (CTR)
- 19% increase in conversion rate (CVR)
- 31% decrease in cost per conversion (CPA)

TurboTax uses CM to go across devices

TurboTax knows that customers use mobile for early tax planning and research but then use their desktops and laptops to do the actual work of filing. Personalizing a customer's experience on their path to purchase can be tricky when that journey goes from mobile to desktop and back, but CM is able to identify customers regardless of the device they're on. TurboTax used CM and mobile modifiers to adjust its bids, helping it be there and be useful in those I-really-need-to-finish-my-taxes [moments](#), even when its customers are on the go.

"When we greet these customers at our front door with a message that isn't just 'one size fits all'—when we know they're a returning customer—we're starting their tax prep experience on the right foot," said Cathleen Ryan, director of marketing and advertising at TurboTax.

TurboTax cuts costs and drives conversions

TurboTax's strategy with CM also enabled it to accurately identify customers on mobile more than any other technology the brand has used to date. This meant a more relevant and useful customer experience that led to TurboTax seeing its own kind of "refund": the brand delivered a 14% increase in CTR and a 19% increase in CVR, as well as a 31% decrease in CPA compared to other Search campaigns.



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The brand was pleasantly surprised to find that over 50% of their customer list matched with Google. As a result, TurboTax reached significantly more customers on Google Search than expected, enabling them to provide a tailored experience for many of their most loyal customers.