

Success Story: Liberty Tax



Liberty Tax operates one of the largest tax preparation franchise systems in the United States, with approximately 1,700 locations across all 50 states. During tax season, the business experiences a surge in customer inquiries as individuals seek help preparing their returns. For both franchise locations and corporate teams, reliable communication is essential to capturing leads, supporting clients, and maintaining operational efficiency.

Jeffrey Schubert, Compliance Liaison at Liberty Tax Corporate and owner of two Liberty Tax franchise locations in Ohio, works closely with franchisees across the network. His role focuses on helping offices stay compliant, training preparers, and ensuring franchisees have the operational support they need to succeed.

“With our business, communication is critical,” Schubert said. “We’re busiest from January through April, and during that time every call matters.”



Challenge

Before transitioning to GoTo Connect, Liberty Tax franchise locations were using Jive as their preferred phone system. When GoTo acquired Jive, the platform continued to evolve with expanded capabilities and support.

As the Liberty Tax network grew, franchisees needed a communications system that could adapt to seasonal demand while supporting both corporate oversight and independent franchise operations.

During peak tax season, offices receive high volumes of calls from customers scheduling appointments, asking questions about refunds, or requesting help with tax documents. Missing those calls can mean losing potential clients.

“If you’re missing 10 or 12 calls a day, that’s not a good thing,” Schubert said. “That’s a client walking out the door.”

Franchisees also needed flexibility to adjust call routing and messaging throughout the year as demand changes. At the corporate level, standardizing around a reliable system also simplifies support.

“If we all understand the same platform, we know where to fix things and where to go for help,” Schubert said.

“In the past some offices had one line and a portable phone. Now with GoTo Connect, everyone can have their own line and voicemail.”

Jeffrey Schubert
Compliance Liaison
and Franchise Owner,
Liberty Tax



The Solution

As Jive became part of GoTo Connect, Liberty Tax franchisees gained access to a flexible communications system while continuing to use technology they were already familiar with.

GoTo Connect allows franchise locations to manage call routing, voicemail, and phone settings through an online interface, making it easy to adjust workflows throughout the year.

“Our needs change as the season moves along,” Schubert said. “We’re very busy January through April and then things slow down. Being able to adjust things quickly is a huge advantage.”

The platform also simplifies bringing new offices online. Franchisees opening or acquiring locations can deploy communication systems quickly without waiting for traditional phone installations.

“You can onboard a location within a day or two,” Schubert said.

Today, approximately 130 Liberty Tax locations are using GoTo Connect, with adoption continuing to grow across the network.



Improved Customer Responsiveness

GoTo Connect helps Liberty Tax offices ensure that customer calls are captured and answered quickly. Calls can be routed efficiently, voicemails are delivered directly to inboxes, and teams can follow up quickly when inquiries come in.

“It’s not missing that call. It’s not missing that client,” Schubert said. “If someone reaches out, we want to make sure we’re able to respond.”

Automated call routing also allows offices to handle common questions—such as refund status inquiries—without requiring staff to answer every call, helping teams manage high call volumes during tax season.



Supporting Franchise Operations

GoTo Connect also improves how franchise offices operate internally. Many locations now provide individual phones and voicemail boxes for employees instead of relying on shared lines.

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“If I had to describe GoTo Connect in one sentence for franchise systems, it would be **consistency** across the board.”

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From a corporate perspective, the platform provides better visibility into call activity across the network, helping teams identify missed opportunities and support franchisees more effectively.



A Platform Built for Franchise Growth

For prospective franchise owners, having recommended technology systems already in place simplifies the process of launching a new business.

“That’s why people buy into franchise systems,” Schubert said. “Because everything is unified and we provide the contacts, vendors, and software.”

GoTo Connect also supports Liberty Tax’s long-term growth by making it easy to replicate communication systems as new offices open.

“It’s easy to replicate an office and add phone systems as you grow,” Schubert said. “You’re not waiting for a phone company to install something.”



Looking Ahead

Liberty Tax currently uses GoTo Connect primarily for its phone system but is exploring additional capabilities such as integrated fax and AI-powered call handling.

“We’re looking at integrating AI so calls can be answered 24/7 even when we’re not there,” Schubert said. “That’s huge so we don’t miss leads.”



Consistency Across the Franchise Network

Liberty Tax currently uses GoTo Connect primarily for its phone. For Schubert, the biggest advantage of GoTo Connect is the consistency it brings to a distributed franchise organization.

“If I had to describe GoTo Connect in one sentence for franchise systems, it would be consistency across the board,” he said.

“The success of a franchise system is built on trust, accuracy, and consistency. Having a communication system that supports that makes a big difference.”