

Tax and Financial Planning Firm Completes Nearly 800 Tax Returns in One Year with Infusionsoft

BACKGROUND

Gleason Tax Advisory Group, LLC is a tax and strategic financial planning firm that specializes in helping their customers plan for a worry-free retirement.

"While we perform year-round financial planning, our tax advising is pretty seasonal; we do a large portion of our tax advising during tax season," says Mr. Gleason.

CHALLENGES

After pairing their financial planning practice with tax services, the Gleasons found themselves using multiple applications to manage their customers and day-to-day tasks. When their business grew rapidly, they realized they devoting too much time to too many systems. They were also spending a significant amount of money trying to acquire leads. This left neither time nor money to nurture the leads they had.

"When we were looking at better ways to juggle lead acquisition and business management, a friend asked me, 'how many sales do you think you missed because you weren't following up with your clients?'" says Mr. Gleason. "That made me ask, 'How much revenue are we missing out on?'"

SOLUTION

It was after this conversation that Mr. Gleason's friend recommended Infusionsoft as he was successfully using it for his own business. Mr. Gleason followed his friend's advice, and in October 2008, Gleason Tax Advisory Group got started with Infusionsoft. Today, the Gleasons are still discovering Infusionsoft's potential. "We had a lot of information in other systems. When we realized Infusionsoft could become a hub for everything in our office, things changed for the better quickly," says Mrs. Gleason.

RESULTS

In 2011, the Gleasons completed nearly 800 tax returns as a result of implementing Infusionsoft, and they generated significant revenue without incurring any costs.

"Before Infusionsoft, we spent money on newspaper ads and direct mail. With Infusionsoft, we've cut our print spending to focus entirely on digital. As a result, we filled all our tax appointments and actually had to create a waiting list to meet the demand," says Mr. Gleason.

Mr. Gleason calls his wife a "mad scientist" because of everything she has achieved in business using Infusionsoft. Together, they've uncovered a whole new set of skills with the application. Most importantly, they now have more time to spend together as a family.

"Infusionsoft is an automation Ferrari so don't leave it just sitting in the garage. Put it to work; take it for a ride, or else you're doing a disservice to yourself and the application. And the ride is exhilarating."

– Joe and Janette Gleason
Co- Owners, Gleason Tax Advisory Group LLC



FAST FACTS

Company: Gleason Tax Advisory Group, LLC

Owner: Joe and Janette Gleason

Employees: 2

Revenue: More than \$500,000

Years in Business: 7

Industry: Tax Advisory

Location: Surprise, Ariz.

Customer Since: September 2008

Website: azfinancialplanning.com

Key Results:

- Increased revenue from \$39,000 in 2010 to \$89,000 in 2012
- Provided tax advising for 1,069 clients (compared to 438 in previous years)
- Provided financial planning services for 249 couples (compared to 75 in previous years)

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