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# Intuit Supercharges Virtual Expert Platform with AI Enhancements to Streamline Expert-Assisted Tax Filing

*Intuit's platform behind TurboTax Live connects people to experts and helps build customer confidence, while driving personalized experiences at scale and reducing tax filing time*

MOUNTAIN VIEW, Calif.--(BUSINESS WIRE)-- [Intuit](#) (Nasdaq: INTU), the global financial technology platform that makes [TurboTax](#), [Credit Karma](#), [QuickBooks](#), and [Mailchimp](#), has introduced artificial intelligence (AI) enhancements for its [Virtual Expert Platform](#) to drive highly-personalized experiences, connecting consumers with experts and reducing tax filing time with its portfolio of [TurboTax Live](#) products.

As an AI innovator and industry leader serving more than 100 million consumer and small business customers worldwide, Intuit incorporates AI technologies—including machine learning, natural language processing, and knowledge engineering—to seamlessly blend digital and live human experts on the platform behind the company's [TurboTax Live](#) and [QuickBooks Live](#) products and services.

For the 2022 tax season, a combination of AI automation and augmentation is benefiting taxpayers and tax professionals alike. Now, with [TurboTax Live Full Service](#), customers can be matched immediately to a tax expert from Intuit's nationwide network to complete tax preparation from start to finish in a single session, rather than over the course of a few days.

“This tax season, AI will supercharge experts and experts will supercharge AI, helping to deliver advice at scale for customers and experts,” said Intuit Chief Data Officer Ashok Srivastava. “Intuit offers augmented intelligence that sits on the shoulders of its experts. With each interaction, our platform gets smarter, driving further automation of repetitive tasks, increasing accuracy, and allowing experts to focus on providing faster value to customers. Our goal is to cut filing times substantially by streamlining consumer and expert experiences with TurboTax Live Full Service.”

Enhanced and optimized AI advancements include:

- **Sophisticated AI models that accelerate and optimize real-time matching and routing** of customers to the right expert at the right time, tailored to customers' specific needs and experts' profiles, capacity, and past performance.
- **Intelligent digital assistance tools** to more quickly and effectively deliver personalized experiences, such as automating repetitive tasks to save time and drive efficiencies throughout the tax filing process. For example, AI-powered document understanding tools extend the ability to extract and categorize data from forms, improve the identification, classification and placement of data in the correct fields, and intelligently auto-populate tax form information and suggestion functions from customer-provided documents. This frees up the tax expert from administrative,

manual extraction, classification and transcription work to focus on value-added services for customers. For a deeper personalized experience, AI-powered tools also improve and fine-tune responses and answers to questions posed by customers looking for fast, digital expertise.

- **Real-time information and suggestions during customer conversations**, on a voice call or on chat, based on consented customer data, previous and current conversations, and in-product activity. These enhancements provide experts with a wealth of knowledge — including article recommendations, auto-complete suggestions and response snippets to choose from – that put information at their fingertips for accurate and quick resolutions during customer engagements, while automating smaller requests and responses.
- **Real-time conversation summary features** that enhance expert engagement and customer follow-up with real-time summaries of a customer’s journey and touchpoints for quick reference. Automation of call summaries and note-taking captures questions, actions, and resolutions for each engagement. The new features also score the quality of the call and predict the likelihood of resolution.

Intuit’s Virtual Expert Platform is one example of how Intuit is fueling innovation through a [common financial technology platform architecture](#) shared by all of the company’s products and solutions to accelerate innovation at scale for its consumer and small business customers.

## About Intuit

Intuit is the global financial technology platform that powers prosperity for the people and communities we serve. With more than 100 million customers worldwide using [TurboTax](#), [Credit Karma](#), [QuickBooks](#), and [Mailchimp](#), we believe that everyone should have the opportunity to prosper. We never stop working to find new, innovative ways to make that possible. Please visit us for the latest information [about Intuit](#), our products and services, and find us on [social](#).

*This information is intended to outline general product direction, but represents no obligation and should not be relied on in making a purchasing decision. Additional terms, conditions and fees may apply with certain features and functionality. Eligibility criteria may apply. Product offers, features, functionality are subject to change without notice.*

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