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Impact of Communication and Follow-Up on Customer Satisfaction in Digital Tax Filing Services

A Case Study of Clear (ClearTax)

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Abstract

In technology-driven service environments, effective communication and systematic follow- up play a critical role in shaping customer satisfaction and operational efficiency. This study examines the impact of communication practices and follow-up mechanisms on customer satisfaction in digital tax filing services. The research adopts a quantitative descriptive approach and is based on primary data collected from employees involved in client coordination and tax filing processes within a digital tax service platform. Statistical tools such as percentage analysis, Chi-square test, correlation analysis, and one-way ANOVA were applied for data analysis. The findings reveal that timely communication and structured follow-up significantly reduce delays in document submission, minimise errors, and enhance workflow efficiency. The study further highlights responsiveness as a key service quality dimension influencing customer satisfaction in digital tax services. The research provides practical insights for improving communication strategies through automation, integration, and process standardisation.

Keywords: Communication, follow-up, customer satisfaction, digital tax filing, fintech services

1. INTRODUCTION

The digitalisation of financial and tax-related services has transformed the manner in which individuals and businesses fulfil statutory compliance requirements. Online tax filing platforms have simplified processes by integrating automation, analytics, and professional assistance. However, despite technological advancements, tax filing remains a complex activity due to regulatory requirements, documentation accuracy, and strict filing deadlines.

Effective communication between service providers and clients is essential to ensure timely document submission and error-free filing. Inadequate communication and irregular follow-up often result in misunderstandings, repeated clarifications, and operational delays, particularly during peak tax seasons. These issues not only increase workload for service providers but also reduce customer satisfaction.

In digital tax filing services, communication acts as a bridge between technology and human intervention. Timely updates, reminders, and follow-ups help clients remain informed and engaged throughout the filing process. This study focuses on examining how communication and follow-up practices influence customer satisfaction and operational efficiency in digital tax filing services from an internal operational perspective.

2. REVIEW OF LITERATURE

Service quality research has consistently identified communication and responsiveness as significant determinants of customer satisfaction. The SERVQUAL framework identifies responsiveness as a key dimension influencing customers' perception of service quality. Studies across banking, healthcare, and professional services indicate that prompt responses and proactive engagement enhance trust and satisfaction.

Research on digital and fintech services suggests that while automation improves efficiency, human communication remains crucial in resolving complex service interactions. E-service quality studies emphasise that responsiveness, reliability, and efficiency strongly influence customer satisfaction in technology-enabled platforms.

Post-pandemic research highlights an increase in customer expectations regarding communication speed and transparency. Customers now expect real-time updates, proactive reminders, and quick resolution of queries. Despite extensive literature on service quality, limited empirical research focuses on communication effectiveness within Indian digital tax filing platforms. This study attempts to address this gap by examining communication and follow-up practices in a fintech-based tax service context.

3. OBJECTIVES OF THE STUDY

The objectives of the study are:

1. To examine the impact of regular client follow-up on timely submission of tax documents.
2. To analyse the relationship between communication practices and customer satisfaction in digital tax filing services.
3. To identify communication-related challenges affecting operational efficiency during the tax filing process.

4. NEED FOR THE STUDY

Digital tax filing services handle large volumes of client data within limited timeframes. Ineffective communication can lead to delays, errors, and customer dissatisfaction. Understanding how communication and follow-up influence service outcomes is essential for improving efficiency and maintaining service quality. The study provides insights that can help digital tax service providers optimise communication strategies and improve customer experience.

5. SCOPE OF THE STUDY

The study focuses on communication and follow-up practices in digital tax filing services. It is limited to employees involved in client coordination and filing processes. The research does not include auditing or

advisory services. The findings are based on internal operational perspectives and are confined to a specific time period.

6. RESEARCH HYPOTHESES

- H_{01}: Regular client follow-up does not significantly influence timely submission of tax documents.
- H_{11}: Regular client follow-up significantly influences timely submission of tax documents.
- H_{02}: Communication frequency has no significant impact on customer satisfaction.
- H_{12}: Communication frequency has a significant impact on customer satisfaction.
- H_{03}: Effectiveness of communication channels does not significantly affect operational efficiency.
- H_{13}: Effectiveness of communication channels significantly affects operational efficiency.
- H_{04}: Poor communication does not significantly contribute to delays and errors in tax filing.
- H_{14}: Poor communication significantly contributes to delays and errors in tax filing.

7. RESEARCH METHODOLOGY

The study adopts a quantitative descriptive research design. Primary data were collected through a structured questionnaire administered to 50 employees involved in tax filing, client communication, and follow-up activities. Convenience sampling was used due to time and accessibility constraints.

The questionnaire consisted of close-ended questions measuring communication frequency, effectiveness of communication channels, follow-up practices, CRM usage, and perceived operational efficiency. Data were analysed using descriptive and inferential statistical tools at a 5% level of significance.

8. DATA ANALYSIS AND RESULTS

The analysis indicates that most clients submit required documents within a reasonable timeframe when regular follow-ups are conducted. Statistical testing using the Chi-square test confirmed a significant relationship between follow-up frequency and timely document submission. Correlation analysis showed a positive association between communication frequency and customer satisfaction.

One-way ANOVA results revealed that the effectiveness of communication channels significantly influences operational efficiency. Further analysis confirmed that poor communication contributes to delays and errors in tax filing processes. These results demonstrate the importance of structured communication systems in service delivery.

9. DISCUSSION

The findings support existing service quality literature, particularly the importance of responsiveness in service delivery. Regular communication and systematic follow-up reduce uncertainty, improve coordination, and enhance customer satisfaction. Neutral responses regarding CRM tools indicate scope for improvement in system integration and usability. The results demonstrate that communication effectiveness is a strategic factor rather than merely an administrative function in digital tax services.

10.MANAGERIAL IMPLICATIONS

The study offers the following managerial implications:

- Automated follow-up systems can reduce manual workload and improve client responsiveness.
- Integrated CRM platforms can enhance communication visibility and coordination.
- Standardised client prioritisation frameworks can improve efficiency during peak filing periods.
- Client education initiatives can minimise misunderstandings and incomplete submissions.

11.CONCLUSION

The study concludes that effective communication and proactive follow-up are essential determinants of customer satisfaction and operational efficiency in digital tax filing services. While technological automation supports scalability, human-centred communication remains critical in managing complex service interactions. Strengthening communication strategies through automation, integration, and standardisation can significantly enhance service quality and customer experience in fintech-based tax platforms.

Declaration of Conflicting Interests

The authors declare no potential conflicts of interest with respect to the research, authorship and publication of this article.

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