



Empowering Client Managers: Advisory Services

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Empowering Client Managers: Shifting Focus to **Advisory Services** with Corient Solutions



Introduction:

The Firm's client managers were burdened with administrative tasks, detracting from their ability to provide valuable advisory services to clients. Through our partnership and tailored solutions, we enabled client managers to streamline their workflow, reduce review times, and prioritize advisory roles, leading to enhanced client satisfaction and business growth.

Problem Statement:

Firm's client managers faced several challenges:

- Spending excessive time on non-advisory tasks such as staff training, quality assurance, and query resolution.
- Lengthy review times for client jobs, averaging 4-5 hours per job.
- Need for continuous training and management of staff, consuming valuable time and resources.
- Inadequate focus on advisory services due to operational burdens and workflow inefficiencies.



Finance is not
about money. It's
about making
dreams come true.

~ Robert Kiyosaki



How We Helped:

Our collaboration with the Firm resulted in significant improvements:

- **Reduction in Review Time:** We implemented streamlined processes that reduced client manager review times from 4-5 hours to just 2 hours per job, enabling faster turnaround and increased efficiency.
- **Time Savings from Staff Training:** By outsourcing base work to Corient Solutions, the Firm eliminated the need for staff training and improvement plans, saving considerable time previously spent on people management.
- **Quicker Turnaround:** With optimised workflows and support from Corient Solutions, the Firm experienced quicker turnaround times for client jobs, enhancing service delivery and client satisfaction.
- **Elimination of People Management:** By leveraging Corient Solutions, the Firm relieved client managers from the burdens of people management, allowing them to focus solely on advisory roles and client interactions.
- **Increased Focus on Advisory Services:** With Corient handling base work, client managers redirected their focus towards improving client processes and providing valuable advisory services, leading to enhanced client relationships and business growth opportunities.

Conclusion:

Through our tailored solutions and strategic partnership, the Firm's client managers successfully transitioned from administrative tasks to focusing on high-value advisory services. The reduction in review time, elimination of staff training responsibilities, and increased focus on client advisory roles underscore the transformative impact of Corient Solutions in optimizing workflow efficiency and driving business success.



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The word accounting comes from the word accountability. If you are going to be rich, you need to be accountable for your money.

~ Robert Kiyosaki

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