



Streamlining Workflow Management

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Streamlining Workflow Management For Practices



Introduction:

The Accounting Firm faced challenges with the manual updating of workflow data on Google Spreadsheets, leading to inconsistencies and potential risks of non-compliance with GDPR regulations. To address these challenges and improve workflow efficiency, the Accounting embarked on a journey towards automation.

Problem Statement:

The Accounting Firm encountered the following issues with their manual workflow management system:

- Incomplete or inconsistent data entry in spreadsheets.
- Lack of visibility regarding expected deliverable dates.
- Frequent changes in task priorities without proper notification.
- Difficulty in tracking data due to manual date tracking methods.



If you wait until
there is another case
study in your
industry, you will be
too late!

~ Seth Godin



Actions Taken:

To mitigate these challenges and streamline workflow management, the Accounting Firm reached out to Corient for developing a solution. Corient with intensive discussion with the Accounting Firm, implemented the following actions:

Development of an Online Workflow Management System:

- Corient invested in the development of an online workflow management system to replace manual spreadsheets.
- This system provided a centralised platform for adding jobs, uploading documents, filling in year-end checklists, and tracking job statuses.

Impact of the Actions Taken:

The implementation of the online workflow management system yielded significant positive outcomes for the Accounting Firm:

- **Centralised Platform for Workflow Management:** The online system served as a one-stop application for all workflow-related tasks, simplifying the process for employees.
- **Improved Transparency:** Employees gained better visibility into the status of jobs and expected deliverable dates, enhancing overall transparency in workflow management.
- **GDPR Compliance:** By migrating from manual spreadsheets to an online platform, ABC Company ensured GDPR compliance by implementing necessary security measures to protect sensitive data.
- **Proactive Tracking of Workflow and Hours:** With the automated system, the Accounting Firm could proactively track workflow progress and employee hours, allowing for better resource allocation and project management.

Conclusion:

The successful automation of workflow management at the Accounting not only addressed existing challenges but also paved the way for enhanced efficiency, transparency, and compliance. By embracing technology and investing in a tailored solution, the Accounting Firm achieved greater control over its workflow processes while mitigating risks associated with manual data management



Accounting is not just numbers, but a solution to all business problems.

~ Anuj Jasani

