



# Fast-Track Your Client's Year-End Job Turnaround with These Proven Techniques

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## Introduction

A client contacted Corient to complete their year-end jobs within 90 days. The client faced challenges meeting this timeframe due to delays in receiving information from end clients and inefficient review processes. Corient was tasked with streamlining the workflow to ensure the timely completion of year-end jobs.

## The Problem?

- The client needed to complete year-end jobs within 90 days.
- Delays were caused by missing information from end clients.
- Partner review times were extended due to multiple queries raised during the review stage, which led to further amendments.

## Corient Solution

- Implemented an advanced workflow where any missing information or documents were requested at the initial stage of the job.



**The best accountants  
are the architects of  
financial legacies.**

– Laura Anderson



- Ensured that partner review time was saved by eliminating the need for partners to query end clients during the review process.
- Streamlined the workflow to reduce amendments on jobs by addressing all potential queries upfront.

## Challenges Faced

- Significant waiting periods for information from end clients delayed job progression.
- Multiple queries were raised via email or phone during job processing, extending the time before the final file could be sent for partner review.

## Overcoming the Challenges

- Established KPIs to track and monitor waiting periods, informing the client about delays due to extended waiting times from end clients.
- We created a decision-making matrix, which was agreed upon with the client, to prevent repetitive questions. This allowed the team to make informed decisions without repeatedly reaching out to end clients for clarification.



“  
**Behind every good  
business is a great  
accountant.**

– Anonymous  
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## Result Achieved

- Partner review times were reduced as all queries had been addressed in the initial stages, and solutions were incorporated into the working files before review.
- The turnaround time for year-end jobs was improved significantly, enabling faster completion of tasks.

## Conclusion

By implementing an advanced workflow and decision-making matrix, Corient helped the client complete their year-end jobs quickly, achieving the desired turnaround within 90 days. End clients could file their accounts with Companies House on time, avoiding penalties or late fees, while the client saved time on reviews and amendments, streamlining their operations.



**The road to success and the road to failure  
are almost exactly the same.**

– Colin R. Davis

