



# Navigating Year-End Deadlines: How to Help Clients Overcome Filing Backlogs

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## Introduction

A client approached Corient with a significant backlog of year-end jobs due to delays in receiving essential information from their end clients. This created challenges in meeting deadlines and fulfilling their obligations. Corient implemented a comprehensive solution to streamline communication, prioritise tasks, and reduce backlogs.



## The Problem?

- The client had a backlog of jobs due to a need for timely information from end clients.
- Difficulty in turning around jobs quickly, leading to missed deadlines.
- The extensive client base and scattered communication caused delays in year-end filing.

## Corient Solution

- Acquired a complete list of year-end clients and organised them by year-end deadlines.
- Created customised draft email templates to communicate regularly with end clients.

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

– Laura Anderson

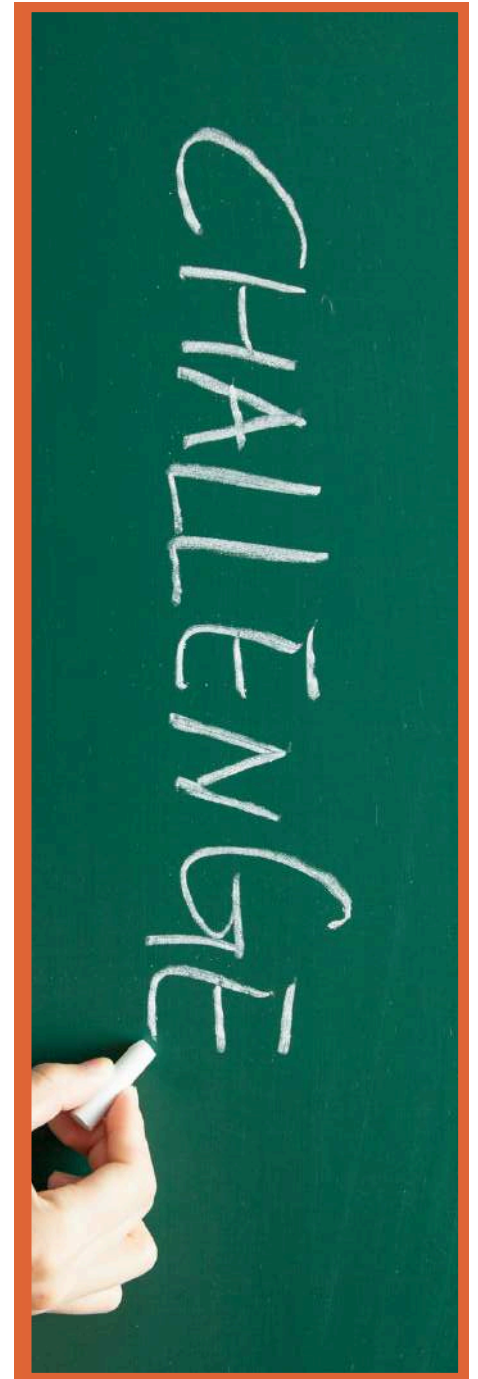
- Prioritised clients based on Companies House filing deadlines and organised workflows for easy tracking.
- Set up a system where all documents and email communications were uploaded into a shared folder for easy access by client managers.
- Involved client managers only when an end client was unreachable after multiple attempts.

## Challenges Faced

- Partially received information from clients, which made chasing up difficult.
- The extensive client base required managing availability and follow-ups, adding complexity.

## Overcoming the Challenges

- Hired an admin to handle all follow-ups, sort data, and maintain the client database.
- Organised client lots based on deadlines and maintained a log sheet for tracking.
- The log sheet documented the last follow-up date, client responses, and specific client communications.
- We used the log sheet to drive KPIs and track response rates effectively.



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

– Anonymous

## Result Achieved



- Client managers saved time by not needing to follow up with end clients for missing documents.
- Client managers focused on reviewing year-end work papers and holding meetings with end clients.
- With the additional time, client managers could onboard new projects and offer services such as management accounts, cash flow forecasting, and other value-added services.

## Conclusion



Through Corient's streamlined approach, the client successfully reduced their backlog, enabling end clients to file their accounts on time without penalties or late fees. The system relieved pressure from last-minute deadlines and allowed client managers to focus on growth and service expansion, enhancing overall productivity.



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

– Colin R. Davis

