The Essential Guide to Streamlining Workflow with Personalised Internal Applications

Introduction

A client using a shared Google Spreadsheet to manage their workflow faced numerous inefficiencies, including difficulty tracking job progress and maintaining accurate, real-time updates. They approached Corient for a more robust, automated solution to centralise and streamline their workflow processes.

The Problem?

- The client needed to improve in managing workflow via a shared Google Spreadsheet.
- Manual updates led to potential data manipulation and inaccuracies.
- The lack of real-time status updates caused difficulties in tracking job progress.
- A centralised and automated system could have improved collaboration.

Corient Solution

- Developed an internal application to manage workflow more efficiently.
- Key features of the solution included:
- Real-time status updates on jobs.
- The ability to add new jobs directly into the system.
- Integration of Standard Operating Procedures (SOPs) for consistency.

> **The best accountants are the architects of financial legacies.**
>
> **– Laura Anderson**

- A feedback collection mechanism to improve processes.
- Centralised all job management tasks within one portal for greater control and visibility.

Challenges Faced

- Migrating existing data from the shared Google Spreadsheet to the new application.
- Ensuring the new system provided real-time updates without lag.
- They were training the client and their internal teams on using the new system.
- It overcomes resistance from users accustomed to manual control and spreadsheet-based processes.
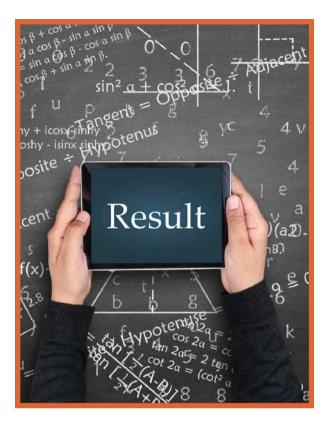
Overcoming the Challenges

- Streamlined data migration process to ensure no loss of critical information.
- We have implemented real-time data synchronisation to optimise system speed and performance.
- We have provided training sessions and comprehensive documentation to assist both the client and internal teams adapt to the new system.
- Collected ongoing user feedback and made necessary adjustments to enhance usability and system efficiency.

Behind every good business is a great accountant.

– Anonymous

Result Achieved

- The new system provided real-time status updates and centralised job management.
- Reduced manual work and eliminated the risks associated with data manipulation.
- The structured approach to managing jobs, SOPs, and feedback improved workflow efficiency.

Conclusion

By implementing a custom internal application, Corient enabled the client to streamline their workflow, improve real-time tracking, and enhance overall efficiency. The centralised system reduced manual errors, optimised job management, and created a structured platform for long-term productivity improvements.

> **The road to success and the road to failure are almost exactly the same.**
> **– Colin R. Davis**