



# How an Accounting Firm Met November Deadlines with Corient Outsourcing Support

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## Introduction



Most companies have a financial year-end on March 31st, with the statutory deadline for filing accounts typically falling nine months later in December. Accounting firms often face immense pressure during the year's final quarter as they rush to meet these deadlines. This case study illustrates how one accounting practice leveraged Corient Outsourcing's services to complete their filings well in advance, reducing last-minute stress and improving overall efficiency.

## The Problem?

The accounting practice faced several issues when it came to meeting year-end filing deadlines:

- **Inability to Meet Deadlines:** The firm struggled to meet December filing deadlines due to clients' late submission of information. Clients' procrastination in providing the necessary data resulted in panic situations towards the end of the year, leading to overtime, increased pressure on the team, and, in some cases, even missed deadlines.

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The best accountants  
are the architects of  
financial legacies.

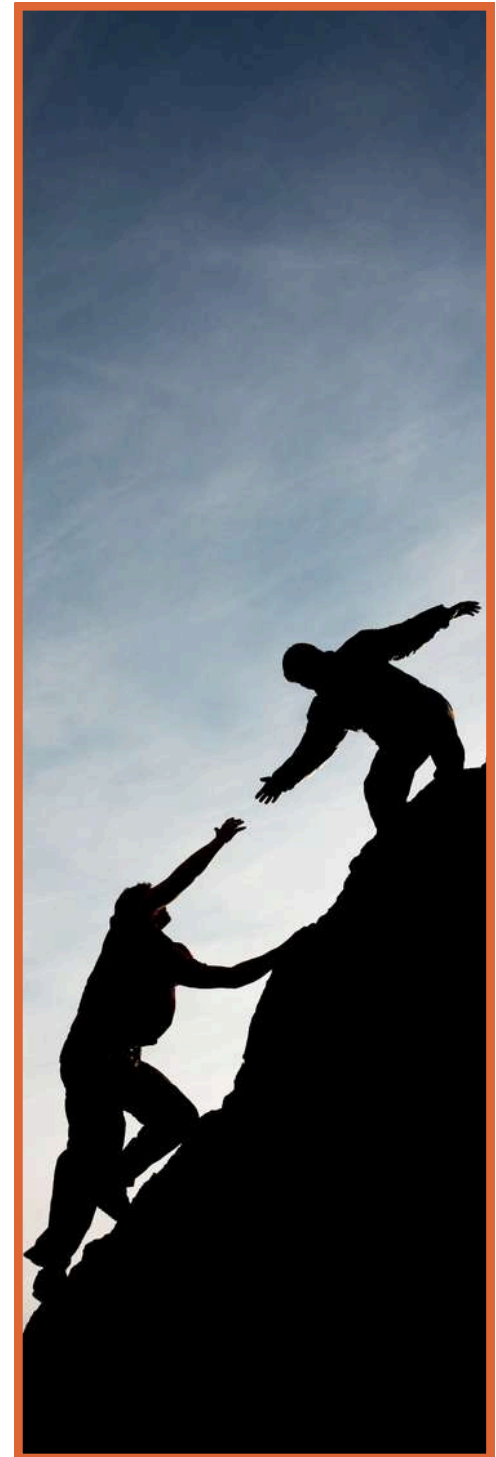
– Laura Anderson  
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- **Operational Overload:** Internal staff were overburdened with the surge of year-end work, negatively impacting productivity and job satisfaction. The lack of consistent workflows and inadequate planning created bottlenecks, making it difficult for the firm to efficiently handle the large volume of tasks within a short timeframe.

## Corient Solution

Corient worked closely with the firm to address these challenges through a series of strategic initiatives:

- **Annual Workflow Planning:** Corient collaborated with the firm to develop a comprehensive yearly workflow plan. Corient ensured tasks were distributed evenly throughout the year by identifying peaks and troughs in workload. This planning enabled the firm to initiate year-end work much earlier, preventing the build-up of tasks and last-minute rushes.
- **Proactive Work Scheduling and Client Communication:** Corient helped the firm establish a systematic plan for requesting client information well before the filing deadlines. By educating clients on the importance of submitting data early and setting up regular follow-ups, Corient ensured timely document submission. This proactive approach enabled the firm to gather necessary information and begin work without delays.



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Behind every good  
business is a great  
accountant.

– Anonymous  
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- **Elimination of Panic Situations:** With organised workflows and early client data collection, the firm eliminated the panic situations that typically occur during year-end. The structured processes provided a clear timeline for tasks, reducing the need for overtime and allowing for better time management.
- **Quarterly Bookkeeping and Regular Document Collection:** Corient recommended that the firm implement a policy of closing the books at the end of each quarter. By requesting and processing documents quarterly, the firm significantly reduced the workload at year-end. This continuous monitoring of financials throughout the year helped keep accounts up-to-date and prevented the last-minute rush often seen in the industry.

## Challenges Faced

Despite these solutions, the firm encountered several challenges during implementation:

- **Client Procrastination:** Many clients were accustomed to providing information closer to the December deadlines. Changing this behavior required a significant effort in client education and engagement.
- **Transition to New Processes:** Integrating Corient's new workflows into the firm's existing processes required adjustments and training for both internal staff and clients. Ensuring seamless communication and data flow between the firm and Corient was critical to success.



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## Overcoming the Challenges

- Corient employed a series of strategies to overcome these hurdles:
- Client Education and Engagement: Regular communication with clients emphasised the importance of timely document submission. Corient helped set up clear client expectations and deadlines, facilitating smoother workflows and early data collection.
- Customised Training for Staff: Corient provided tailored training sessions to the firm's staff on the new processes and workflow management. Regular touchpoints ensured operational issues were promptly addressed, allowing a smooth transition.

## Result Achieved

With Corient's support, the accounting practice achieved impressive results:

- **Timely Completion:** The firm completed all year-end filings by November, a month before the December deadline. This early completion allowed more time for internal reviews and quality checks, enhancing the overall accuracy of the filings.
- **Stress Reduction:** The structured approach and early planning alleviated pressure on the firm's staff. Overtime hours were significantly reduced, and staff well-being and job satisfaction improved.



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

– Anonymous  
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- **Improved Client Satisfaction:** Due to the early filings, clients appreciated the reduced pressure during the tax season. This proactive approach enhanced client relationships and satisfaction, ultimately contributing to long-term client retention and referrals.

## Conclusion

By partnering with Corient Outsourcing, the accounting practice transformed its year-end process, enabling it to complete filings well before statutory deadlines. Through effective workflow planning, proactive client communication, and quarterly bookkeeping, Corient significantly reduced the firm's stress and workload. This collaboration improved efficiency and allowed the firm to focus on strategic growth while ensuring that its compliance obligations were met with ease.



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

– Colin R. Davis

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