



# Scaling Business Through Acquisition with Corient's Back-Office Support

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## Introduction



An accounting practice in the UK aimed to expand its client base through acquisitions but faced internal resource limitations. The partners and team members were overburdened with foundational accounting tasks, leaving little capacity for strategic growth and client advisory services. They needed a reliable back-office solution to focus on high-value activities and accelerate their growth. This case study explores how Corient Outsourcing helped the firm overcome these challenges and scale successfully.

## The Problem?

- **Resource Constraints:** The firm's internal team was occupied with routine back-office tasks like bookkeeping, payroll, and compliance, leaving minimal capacity for client advisory services and business development.
- **Scalability Issues:** The firm needed to expand operations to accommodate a growing client base but required more resources without overburdening the existing staff.



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

– Laura Anderson



- **Client Service Levels:** Maintaining high service standards during expansion was a concern for the firm, as it wanted to ensure that quality would not be compromised.
- **Recruitment and Training:** Rapidly hiring and training new employees to support growth posed a challenge due to time and resource constraints.

## Corient Solution

- **Team Building for Foundation Work:** Corient assembled a dedicated team to handle core accounting tasks such as bookkeeping, payroll, tax compliance, and management accounts. By outsourcing these tasks, the firm's onshore team could focus on high-level client engagements, advisory services, and business growth.
- **Focus on Client Advisory and Service Excellence:** Corient's support allowed the onshore team to provide high-value advisory services and enhance client satisfaction. This enabled client managers to deepen client relationships and offer proactive advice.
- **Strategic Growth and Acquisition Support:** With Corient managing back-office operations, the firm's leadership had the bandwidth to pursue new business acquisitions confidently. The firm could handle the increased workload from acquisitions without compromising service quality.



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

– Anonymous  
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- **Customisable Processes and Flexible Staffing:** Corient tailored its processes to fit the firm's unique requirements, ensuring seamless integration. Corient's flexible staffing solutions allowed the firm to scale resources up or down as needed.
- **Confidence in Service Delivery:** Corient's standardised operating procedures and high-quality output instilled confidence in the firm's ability to maintain service levels as it grew. This allowed the firm's leadership to focus on strategic growth initiatives without worrying about operational disruptions.

## Challenges Faced

- **Initial Integration:** Aligning Corient's team with existing workflows and processes required some initial adjustments. Establishing effective communication channels between the onshore and offshore teams was crucial to prevent disruptions.
- **Client Transition and Communication:** Educating clients about the new processes and ensuring a smooth transition to the outsourced model posed a challenge. Maintaining client trust and satisfaction during the transition was crucial for achieving successful buy-in.



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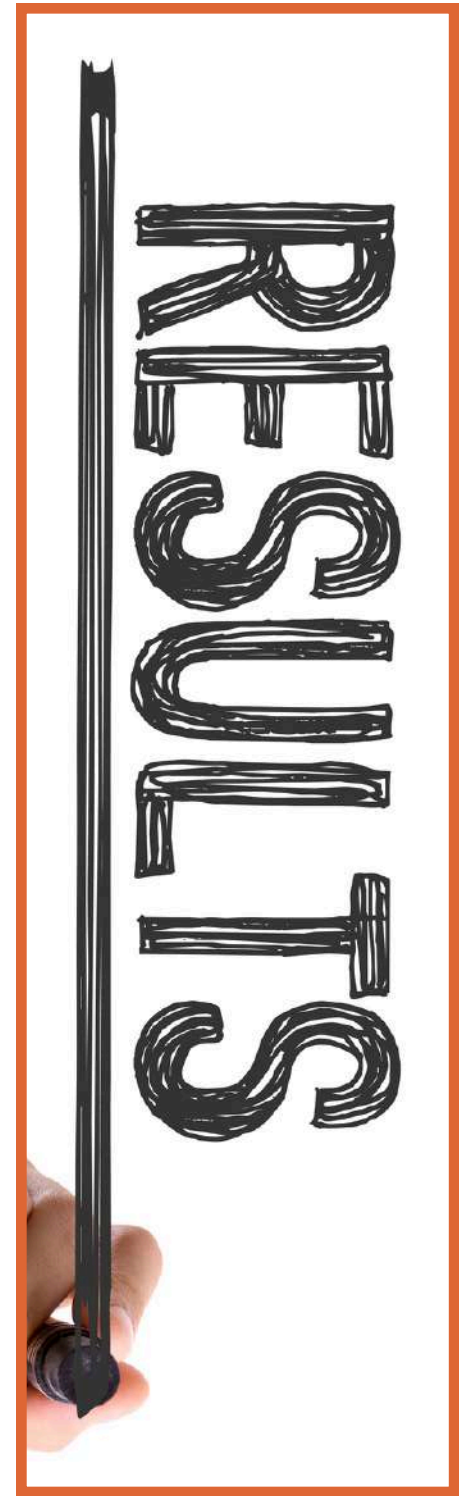


## Overcoming the Challenges

- **Customised Onboarding and Training:** Corient implemented a tailored onboarding program for its team to align with the firm's processes and requirements. Regular touchpoints and feedback sessions ensured that any operational issues were addressed promptly.
- **Proactive Client Communication:** Corient collaborated with the firm to create a communication plan highlighting the new model's benefits and addressing client concerns. Proactive updates and clear timelines helped maintain client trust and satisfaction.

## Result Achieved

- **Increased Capacity for Client Advisory Services:** The firm's client managers could focus on enhancing service levels, providing strategic advice, improving client satisfaction, and strengthening relationships.
- **Successful Business Acquisitions:** With back-office functions managed effectively, the firm acquired two smaller accounting practices, expanding its client base and service offerings.
- **Confidence in Growth:** Corient's support enabled the firm to scale its operations without concerns about recruitment, training, or managing a growing workload.



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- **Process Efficiency and Seamless Integration:** Corient’s adaptable, process-driven approach ensured the firm’s internal culture and workflows were respected, making the partnership seamless and efficient.

## Conclusion

By partnering with Corient Outsourcing, the accounting practice was able to scale its business through acquisitions while maintaining high service standards. Corient’s support allowed the firm to build a reliable back-office team that handled essential tasks, enabling the onshore team to focus on client advisory services and business development. The firm could grow confidently with Corient’s flexible, customisable processes, knowing its operational foundation was in good hands. This partnership paved the way for long-term success and allowed the firm to deliver exceptional value to its clients while expanding its business.



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

– Colin R. Davis

