



Minimising Holiday Disruptions for UK Accounting Firms with Corient's Year-End Support

 +44 24 7610 3333

 www.corientbs.co.uk

 The Techno Centre, Puma Way, Coventry, CV1 2TT,
United Kingdom



Introduction

A leading UK-based accounting firm faced a recurring challenge yearly during the holiday season. With many staff members on leave between mid-December and early January, the firm struggled to maintain productivity at a time when year-end filings, VAT returns, and personal tax return deadlines were looming. Corient's tailored year-end support enabled the firm to seamlessly navigate this period, ensuring compliance, uninterrupted service, and high client satisfaction.

The Problem?

- Staff shortages due to holidays from mid-December to early January reduce available resources during a critical period.
- Risk of missing critical statutory deadlines for year-end filings, VAT returns, and personal tax submissions by January 31.
- High workload pressure leads to the risk of errors and compliance issues.
- Potential strain on client relationships due to delayed responses and unmet deadlines.
- Limited visibility into task progress adds stress to the firm's partners and management.

Corient Solution

- **Holiday-Ready Support Team:**
 - Deployed a fully operational team during the December and January holiday period.
 - We have provided 24/7 support to handle year-end filings, VAT returns, and personal tax preparations.
 - We were allowed the firm's staff to take time off without compromising service delivery.


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

– Laura Anderson 

- **Proactive Planning and Workflow Management:**
 - Collaborated with the firm before the holiday season to identify critical tasks and deadlines.
 - Developed a structured workflow plan, prioritising year-end tasks to ensure timely completion.
 - Scheduled VAT return filings and personal tax preparations well in advance of deadlines.
- **Seamless Client Coordination:**
 - Managed routine client communication, resolving queries, and following up on missing information.
 - Ensured consistent client responsiveness, minimising disruptions during the holiday season.
 - Provided a direct line of support for clients, reducing the burden on the firm's internal team.
- **Compliance Assurance and Quality Control:**
 - Conducted thorough quality checks to meet all HMRC requirements for filings.
 - Reduced the risk of errors and ensured compliance, safeguarding the firm's reputation.
 - Provided an added layer of compliance assurance, minimising potential penalties.
- **Transparent Reporting and Progress Updates:**
 - Delivered regular updates on project status, allowing the firm's partners to monitor progress remotely.
 - Maintained transparency throughout the process, keeping clients informed of their tax return status.
 - Enabled proactive decision-making with clear visibility into ongoing tasks.

Challenges Faced

- Resistance from clients to provide required documents early impacts timely preparation.
- Managing high workloads with a limited internal team due to staff holidays.
- Ensuring consistent, error-free service during peak season with complex year-end tasks.
- Balancing client communication needs without overwhelming the firm's partners during holiday breaks.

Overcoming the Challenges

- Implemented a robust follow-up system to encourage clients to submit documents early.
- Scaled up Corient's support team capacity to handle the high volume of tasks efficiently.



“
Behind every good
business is a great
accountant.

– Anonymous
”



- Employed experienced tax specialists to manage complex filings and minimise risks.
- Took over routine client communications, freeing up the firm's partners for critical decision-making.
- Maintained quality control through rigorous checks, ensuring accurate and compliant submissions.

Result Achieved

- Despite reduced in-house staffing, the firm maintained steady progress on year-end tasks, VAT returns, and personal tax filings.
- All statutory deadlines were met, avoiding potential fines and safeguarding client trust.
- The firm's employees could enjoy their holiday breaks without stress, leading to higher morale.
- Clients appreciated the seamless service and clear communication during the busy holiday period.
- The firm experienced smoother operations, reducing the typical year-end pressure.

Conclusion

By partnering with Corient during the holiday season, the UK-based accounting firm effectively managed staff shortages and high workloads without sacrificing service quality. Corient's proactive planning, dedicated support, and transparent reporting ensured all statutory deadlines were met, compliance was maintained, and clients received exceptional service. This collaboration allowed the firm to navigate the busiest time of the year smoothly, delivering reliable results and fostering long-term client loyalty.



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

– Colin R. Davis

