



Why a UK Accounting Firm Re-Engaged with Corient for Strategic Support ?

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Introduction

A mid-sized UK accounting firm initially collaborated with Corient for a financial record migration project from Xero to QuickBooks. While the project was completed, the client managed regular workloads internally. However, they later re-engaged Corient when faced with increased client demands, recognising the value of Corient's reliable and high-quality services.

The Problem?

- The high-volume client project required cleaning up and migrating financial records from Xero to QuickBooks, demanding precision and adherence to UK standards.
- After expanding their services and acquiring new clients, the firm struggled to manage the increased workload with its internal resources, which affected efficiency and deliverables.

Corient Solution

Initial Engagement: Migration and Clean-Up

- Conducted a detailed review and rectified discrepancies in financial records to ensure accuracy.
- Planned and executed a seamless migration with robust controls, adhering to timelines and minimising disruptions.



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

– Laura Anderson



Re-Engagement: Dedicated Back-Office Support

- Designed a customised back-office team offering bookkeeping, year-end preparation, and financial reporting services aligned with UK accounting standards.
- Provided scalable solutions, allowing the client to adjust the level of support based on their workload.

Value-Added Services

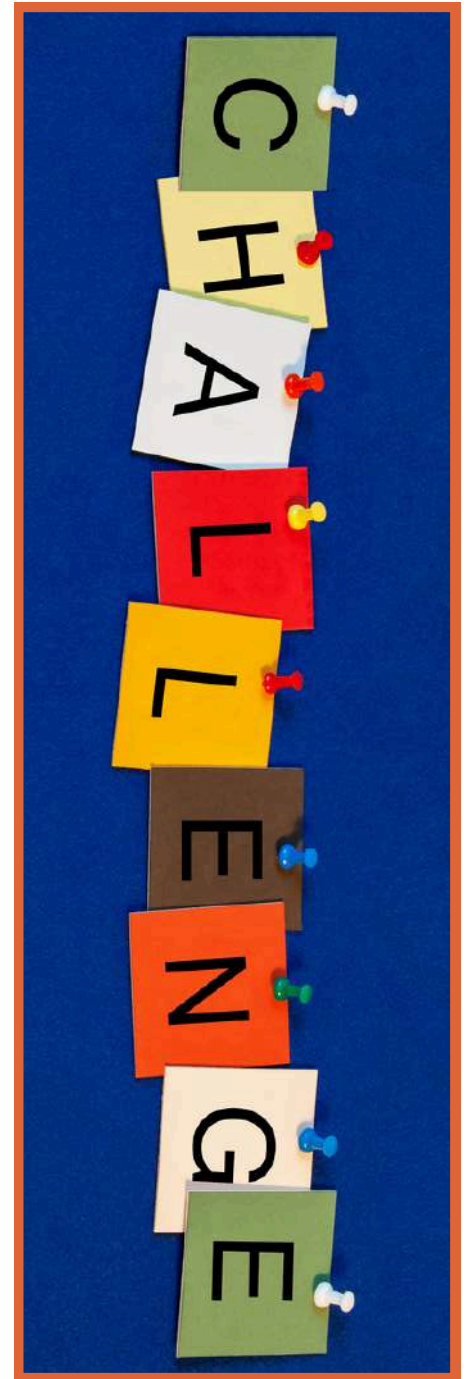
- Introduced financial ratio analysis and trends reporting to deliver actionable insights for client businesses.
- Ensured proactive communication to resolve queries and provide real-time updates.

Challenges Faced

- Addressing inconsistencies and discrepancies in financial data during the initial clean-up phase.
- Meeting the client's increasing demands for high-quality deliverables within tight deadlines after re-engagement.

Overcoming the Challenges

- Applied a systematic data validation and migration approach, ensuring a flawless transition between systems.
- Allocated a dedicated team to handle the increased workload, ensuring high standards and timely delivery.



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

– Anonymous

Result Achieved



- **Enhanced Efficiency:** The client's operational efficiency improved significantly with Corient's back-office support.
- **Client Satisfaction:** Timely, accurate deliverables led to stronger client relationships and satisfaction.
- **Cost Savings:** The firm optimised resource allocation and reduced costs by leveraging Corient's scalable solutions.
- **Growth Enablement:** The client could focus on client acquisition and advisory services while relying on Corient for backend operations.

Conclusion

Corient's commitment to delivering dependable, high-quality services enabled the UK accounting firm to overcome challenges, scale operations, and achieve sustained growth. This case highlights Corient's ability to build lasting partnerships by addressing immediate needs and providing long-term value. Whether for specific projects or ongoing support, Corient remains a trusted partner for UK accountants.



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

– Colin R. Davis

