



UK Accounting Firms Tackle Tax Season Stress-Free with Corient

Highlights

- 1 Achieved **early submission of personal tax returns**, reducing year-end pressure
- 2 Assigned **specialised tax experts** to manage UK compliance and complexity
- 3 Streamlined **client communication** and document collection process
- 4 Reduced **errors and rework**, improving client trust and satisfaction

Introduction

Each year, as the calendar flipped to November, a prominent **UK-based accounting firm** braced itself for its most stressful season—**personal tax return time**. From November through January, their offices were consumed by chaos. The staff was stretched thin, deadlines loomed, and the constant pressure often led to mistakes or overlooked submissions.

Despite best efforts, the situation repeated year after year. Clients would delay sending documents, and the team would scramble through December. By January, they were racing the clock to avoid **HMRC penalties**. Eventually, the firm realised they needed a new approach—**one that brought order to the madness**.

That's when they partnered with Corient, known for delivering structured, scalable **Accounting Outsourcing Services** designed for peak-season performance.



The Initial Problem: What Went Wrong?

The problems were familiar but no less severe. Starting in November, the workload increased dramatically. However, the real crunch came in **December and January**, when every team member was swamped trying to meet the **January 31 personal tax deadline**.

There wasn't enough time, there weren't enough hands, and too often, the firm had to **rush submissions**. With clients sending documents late and communication lines overwhelmed, the margin for error shrank. Each misstep brought **non-compliance risk**, strained client trust, and long nights in the office.

Corient's First Solution: The Fix

Corient's first step was to **start early**—in **early November**, their team engaged the firm to develop a complete tax season roadmap. They introduced a **dedicated personal tax team**, fully versed in UK regulations, whose sole focus was tax return preparation and review.

This team took over **data collection**, organising client files, following up on missing information, and flagging inconsistencies. The firm's internal accountants were finally able to shift their focus—from firefighting to client strategy and relationship building.

Corient also established a staggered review system, allowing returns to be reviewed and filed progressively—eliminating the end-of-January rush that previously plagued the firm.



The New Problem: A Surprise Roadblock

As the process rolled along, a new and familiar challenge appeared: **clients weren't sending their documents on time**. Despite the early outreach, some clients still delayed responses, and critical documents remained missing until December.

The team faced a dilemma: How to nudge clients without overwhelming already-busy staff, and how to keep everything moving without risking late submissions?

Corient's Second Solution: Fixing the New Problem

Corient pivoted quickly, implementing a **multi-step solution** to get things back on track:

Step 1: Targeted Follow-Ups

A combination of **automated email reminders** and **personal calls** helped encourage early document submissions and kept clients informed without being intrusive.

Step 2: Expanded Support Team

Corient scaled up its team for January, adding extra hands to handle the final wave of returns efficiently, no matter when documents arrived.

Step 3: Hands-Off Client Coordination

Corient took over **routine client communications**, managing questions, chasing missing paperwork, and updating clients—freeing the firm's accountants to focus on final checks and advisory.

Step 4: Quality and Compliance Checks

Every return was run through **Corient's internal compliance protocols**, ensuring complete alignment with **HMRC's regulations** and minimising the need for corrections.

Step 5: Real-Time Visibility

Regular updates were sent to the firm's leadership, offering clear insights into progress and pending tasks—no more guesswork or surprises.

OUTCOME



The Final Outcome: Success Story

By mid-January, something incredible happened—**most returns were already filed**. The firm wasn't operating in crisis mode for the first time in years. Staff were less stressed, errors dropped, and clients received smoother, more proactive service.

Better still, the firm started hearing from their clients—not complaints, but compliments.

What the Client Said



“Every January used to feel like a crisis. Since bringing Corient on board, we’ve had our smoothest tax season ever. Their tax specialists were spot-on, and our clients noticed the difference, too. I highly recommend them to any firm looking to level up.”

Key Takeaways: Why This Matters for Businesses

- ✓ **Early planning** eliminates bottlenecks and panic
- ✓ **Specialist teams** reduce compliance risk and improve quality
- ✓ **Outsourced communication** saves time and boosts client service
- ✓ **Clear workflows** reduce errors and increase retention

With Corient’s expert support and **personal tax outsourcing** solutions, accounting firms can eliminate January chaos, increase productivity, and deliver an experience their clients will remember—for all the right reasons.