



Business Expansion Through Acquisition With Corient's Back Office Support

Highlights

- 1 Enabled the firm to **acquire two new practices** while maintaining service quality.
- 2 Offloaded **foundational accounting tasks** to focus on advisory services.
- 3 Built **scalable, flexible support systems** tailored to the firm's needs.
- 3 Maintained **client trust and satisfaction** during operational transitions.

 +44 24 7610 3333

 www.corientbs.co.uk

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

Introduction

Ambition often collides with limitations. For a growing UK-based accounting firm, the desire to **scale through acquisitions** was clear, but so were the internal roadblocks. Their team was overwhelmed with **routine back-office** tasks, leaving little room for strategic initiatives or client advisory services.

That's where Corient Business Solutions stepped in. With deep expertise in **outsourcing core accounting functions**, Corient empowered the firm to realign its focus and confidently scale operations.



The Initial Problem: What Went Wrong?

The firm's growth strategy was solid, but several critical issues strained the execution:

- **Resource Constraints:** The team was involved in **bookkeeping, payroll,** and **compliance**, so it was unable to prioritise strategic initiatives.
- **Scalability Challenges:** They needed more capacity but couldn't afford to quickly burn out existing staff or ramp up recruitment.
- **Client Service Concerns:** Expansion risked compromising the **high-quality service** they were known for.
- **Hiring Limitations:** **Recruitment and training** new staff wasn't feasible under their time constraints.

Corient's First Solution: The Fix

To clear the clutter, Corient implemented a powerful solution:

- **Built a Dedicated Back-Office Team:** A specialised team handled **routine accounting operations, from payroll to tax compliance.**
- **Boosted Client Advisory Focus:** The firm's managers could finally **prioritise strategic client engagement, with day-to-day operations offloaded.**
- **Enabled Acquisition Readiness:** By taking over back-office operations, Corient gave the firm the **bandwidth to pursue acquisitions** without sacrificing client service.

The solution was working. But, as often happens with transformation, a new challenge emerged.



The New Problem: A Surprise Roadblock

During the early stages of integration, the firm faced two significant hurdles:

- **Workflow Alignment:** Integrating **Corient's team** with the firm's established systems and processes was challenging.
- **Client Transition Concerns:** Explaining the **outsourced model to clients** and maintaining trust became critical.

Corient's Second Solution: Fixing the New Problem

Step 1: Tailored Onboarding Program

Corient designed a **customised training plan** to match the firm's internal workflows, ensuring seamless handover and clarity from day one.

Step 2: Frequent Feedback Loops

Regular feedback sessions and check-ins helped identify **pain points quickly** and fine-tune team collaboration.

Step 3: Structured Client Communication Plan

A joint strategy was developed to **educate clients** about the transition, showcasing the **benefits of the new model**.

Step 4: Transparent Progress Updates

Frequent updates and milestone tracking helped clients stay informed, which bolstered trust throughout the process.

Step 5: Process Refinement

The systems were continuously improved to mirror the firm's internal culture, resulting in **a truly integrated workflow**.

Looking for ways to streamline your firm's operations? Explore our [accounting outsourcing services](#) to see how we can help.

OUTCOME



The Final Outcome: Success Story

The result was nothing short of transformational:

- The firm's **client managers had more time** to deliver value-driven advisory services.
- **Two successful acquisitions** were completed, with zero impact on service quality.
- **Operational efficiency skyrocketed**, and the firm could now scale on demand.
- Corient became a **long-term strategic partner**, not just a service provider.

What the Client Said



“We knew growth was possible, but Corient made it real. Their team didn’t just take work off our plate—they gave us the clarity and capacity to grow confidently. Our clients are happier, and our operations are stronger than ever.”

Key Takeaways: Why This Matters for Businesses

- **Delegating foundational tasks** allows your team to focus on growth and strategy.
- **Flexible outsourcing partnerships** like Corient’s enable scalable, seamless operations.
- **Effective client communication** is critical during operational transitions.

Scaling doesn’t have to mean sacrificing quality. With Corient, you can do both.