



# **Highlights**

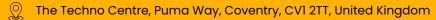
- Enabled the firm to **acquire two new practices** while maintaining service auality.
- Offloaded **foundational accounting tasks** to focus on advisory services.
- Built scalable, flexible support systems tailored to the firm's needs.
- 3 Maintained client trust and satisfaction during operational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



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## 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 <u>Corient Business Solutions</u> 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 highquality 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 <u>accounting</u> <u>outsourcing services</u> 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.





## **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.