



FROM BACKLOGGED TO ON TRACK: CORIENT'S SOLUTION FOR YEAR-END ACCOUNTING DELAYS

Highlights

- 1 **Streamlined year-end processes** for a client facing significant delays
- 2 Introduced **structured workflows** and a **centralised follow-up system**
- 3 Enabled client managers to **focus on growth and client service**

Introduction

Year-end filings are high-stakes and deadline-driven. The situation was critical when a client approached **Corient** with a **backlog of jobs** due to **delayed responses from their end clients**. Without intervention, they faced **penalties and reputational risk**. They needed a partner to bring **order and efficiency**, fast.



The Initial Problem: What Went Wrong?

The firm was dealing with:

- A **mounting backlog** due to clients not submitting essential information on time
- **Missed deadlines** and increased compliance risk
- A **scattered client base** with **no central communication system**
- Client managers are **wasting hours chasing documents** instead of delivering value

The process lacked visibility, priority, and scalability.

Corient's First Solution: The Fix

Corient quickly implemented a solution that introduced **structure and control**:

- Compiled a **master list** of year-end clients, **organised by deadlines**
- Developed **custom email templates** for streamlined, regular communication
- Created a **shared folder system** for real-time access to documents
- Ensured **client manager involvement only when necessary**, preserving their time

This significantly improved the **workflow and communication** process, but it wasn't enough.



The New Problem: A Surprise Roadblock

- Even with the new system, many end clients remained **unresponsive**.
- The challenge evolved into one of **volume and follow-up fatigue**.
- The internal team needed **dedicated support** to handle the flood of follow-ups and ensure nothing fell through the cracks.

Corient's Second Solution: Fixing the New Problem

To eliminate the bottleneck, Corient executed a **five-step plan**:

Step 1: Hired a Dedicated Admin Resource

A full-time admin was appointed to manage **all follow-ups**, maintain databases, and sort incoming documents.

Step 2: Categorised Clients by Urgency

Clients were segmented based on **filing deadlines**, enabling the team to **prioritise effectively**.

Step 3: Created a Centralised Log Sheet

A detailed log was tracked:

- **Last follow-up dates**
- **Client responses**
- **Pending documents**
- **Escalation notes**

Step 4: Use KPIS to Monitor Success

The log sheet became a tool to **track performance**, monitor **response rates**, and improve **efficiency metrics**.

Step 5: Escalated Only When Necessary

Client managers were **only looped in after multiple failed attempts**, allowing them to stay focused on **client delivery and strategy**.

OUTCOME



The Final Outcome: A Success Story

This second layer of structure resulted in:

- **Zero penalties** and **on-time filings**
- Client managers who were **free to review accounts**, conduct meetings, and **deliver insights**
- Expansion into services like **management accounting** and **cash flow forecasting**
- The ability to **onboard new clients** and **grow revenue**

What the Client Said



“Corient gave us the breathing room we desperately needed. Their systemised approach meant we could file accounts on time, avoid penalties, and onboard new clients. It's been a game-changer.”

Key Takeaways: Why This Matters for Businesses

- **Structure transforms chaos** — transparent workflows prevent last-minute panic
- **Delegation adds value** — skilled staff can focus on high-impact work
- **Visibility drives accountability** — tracking tools like log sheets improve response rates
- **Strategic outsourcing enables growth** — the right support partner unlocks business scalability.

Structure and support can differentiate between backlog and breakthrough when deadlines close in.