

HOW CORIENT REDUCED 3,000+ OUTSTANDING QUERIES AND DELIVERED TIMELY MANAGEMENT ACCOUNTS FOR A GROWING ACCOUNTING FIRM

Highlights

- 1 Reduced outstanding queries from 3,000+ to under 800
- 2 Delivered **accurate and timely monthly management accounts**
- 3 Created **real-time MIS** and **follow-up tracker** for subclient coordination
- 4 Empowered the client with **efficient communication** and **faster decision-making**

Introduction

Every accounting firm aims for **precision** and **punctuality**, especially in delivering **management accounts**. One such client approached **Corient** with a familiar issue: their growing client base made it difficult to produce **timely reports**. This case study illustrates how Corient transformed operations through **custom strategies**, **proactive communication**, and **intelligent tracking systems**.



The Initial Problem: What Went Wrong?

The client was overwhelmed by a few significant challenges:

- **Delayed Bookkeeping:** Subclients failed to respond promptly, stalling the bookkeeping process.
- **Last-Minute Year-End Filing:** Incomplete data led to **stressful, last-minute** year-end accounting.

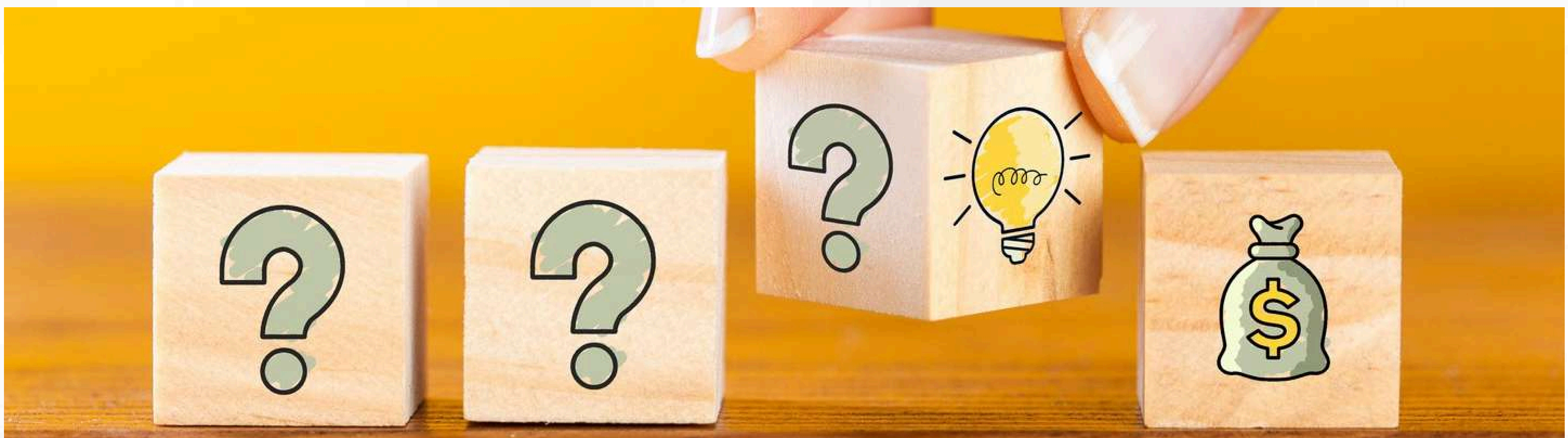
As a result, the client's ability to produce **accurate and timely accounts** was significantly hindered.

Corient's First Solution: The Fix

To tackle these issues, Corient implemented an initial round of solutions:

1. **Thorough Process Audit:** Identified gaps in their existing workflow and communication loops.
2. **Decision-Making Matrix:** Reduced confusion and created a **clear structure** for handling queries.
3. **Real-Time MIS Dashboard:** Tracked **open queries, pending information,** and follow-ups with precision.

These solutions led to early improvements, but soon, another obstacle emerged.



The New Problem: A Surprise Roadblock

As the systems became more organised, another challenge surfaced: **scale**. The client had **hundreds of subclients**, making it difficult to maintain consistent follow-ups, even with improved tools. Without **centralised tracking**, communication delays reappeared.

Corient's Second Solution: Fixing the New Problem

Corient quickly adapted with a **scalable, step-by-step solution**:

Step 1: Follow-Up Tracker

- Designed a **custom tracker** to log every follow-up, response, and deadline.
- Ensured **no subclient** fell through the cracks.

Step 2: Email Templates & Escalation Plans

- Built standardised **email templates** for quick outreach.
- Added **escalation protocols** to contact **end clients** directly if needed.

Step 3: Dedicated Task Ownership

- Assigned team members to **manage specific subclient groups**, ensuring **accountability** and **consistency**.

These measures provided **structure, scalability, and clarity**.

OUTCOME



The Final Outcome: A Success Story

With Corient's approach, the transformation was powerful:

- Outstanding queries dropped from **over 3,000 to under 800**.
- **Response times improved** dramatically.
- The client was able to deliver **on-time, accurate management accounts** every month.

What the Client Said



“Corient didn’t just fix our problem—they changed how we operate. We now work with confidence, clarity, and speed. Scaling up feels possible, not painful”

Key Takeaways: Why This Matters for Businesses

- **Consistent follow-ups** and **real-time tracking** lead to smoother workflows.
- Outsourcing to a partner like Corient delivers **scalable, cost-effective** results.
- **Structured communication tools** are vital for growing accounting practices.

Behind every smooth operation is a system built on **clarity, consistency, and communication**.