CORIENT
Customer Oriented Company

HOW CUSTOM INTERNAL APPLICATIONS STREAMLINE WORKFLOW & BOOST BUSINESS EFFICIENCY

Highlights

1 **Replaced Google Spreadsheet** with a robust internal application

2 Delivered **real-time updates**, improved accuracy, and structured workflows

3 **Integrated SOPs** and feedback tools for continuous improvement

4 Overcame resistance and data migration challenges with **strategic training and support**

Introduction

In the age of digital transformation, manual workflow management can quickly become a bottleneck. One of Corient's clients, a growing service business, had been using a **shared Google Spreadsheet** to manage its workflow. As operations expanded, so did the inefficiencies. They approached **Accounting Outsourcing Services** with a clear goal—to **streamline their workflow and centralise operations** for better control and visibility.

The Initial Problem: What Went Wrong?

On the surface, the shared Google Spreadsheet was a low-cost solution. But as the client scaled, the cracks began to show:

- **Manual data entries** led to errors and potential manipulation
- **No real-time tracking**, making job status updates unreliable
- **Team collaboration** became fragmented without a centralised system.
- **Lack of automation** increased administrative overhead.

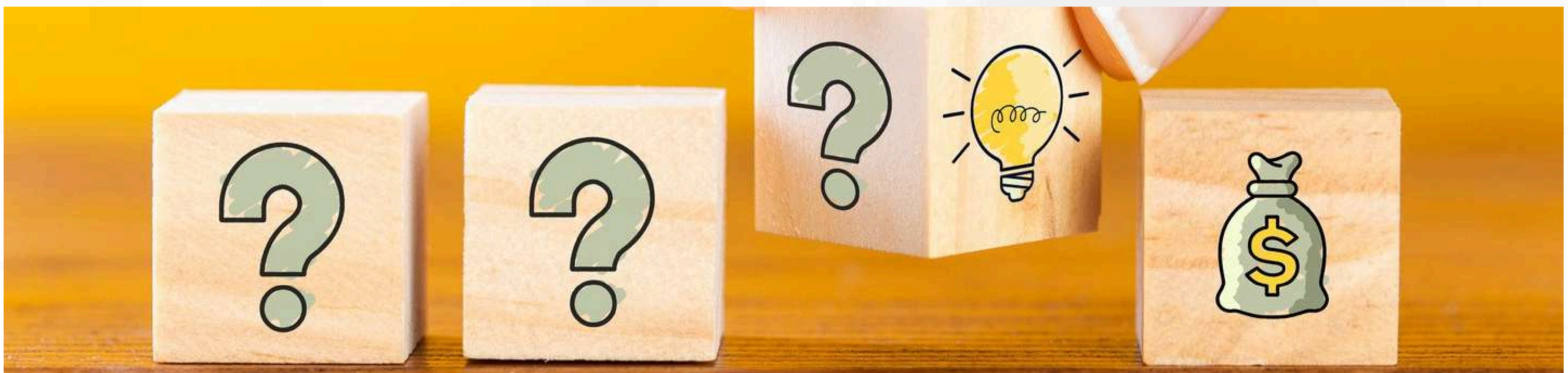It was clear: the current system was holding the business back.

Corient's First Solution: The Fix

Corient developed a **custom internal application** explicitly tailored to the client's operations.

Key Features Included:

- **Real-time job status updates**
- **Direct job entry** via a streamlined interface
- Integration of **Standard Operating Procedures (SOPs)** for process consistency
- **Feedback mechanisms** to capture team insights and suggestions
- A **centralised job management portal** for complete operational visibility

The solution reduced manual errors and transformed how tasks were assigned, tracked, and completed.

The New Problem: A Surprise Roadblock

While the system was technically sound, rolling it out uncovered unexpected challenges:

- Migrating **years of critical data** from the existing spreadsheet
- Ensuring the **new platform delivered real-time updates** with no lag
- Overcoming **resistance from team members** accustomed to manual processes
- Ensuring **user confidence** in adopting the new system

The implementation needed a second wave of solutions to be successful.

Corient's Second Solution: Fixing the New Problem

Step 1: Data Migration Without Errors

Corient engineered a **seamless transfer of all historical data** from the spreadsheet into the new system, preserving accuracy and structure.

Step 2: Implementing Real-Time Synchronisation

The development team introduced **live data sync features** to ensure updates appeared immediately, boosting reliability and user trust.

Step 3: User Training and Onboarding

Comprehensive **training sessions** were conducted, supported by **clear documentation**, allowing teams to adopt the new system confidently.

Step 4: Managing Change Resistance

Corient applied a **gradual rollout strategy**, gathering **real-time feedback** from users to refine the interface and boost acceptance.

OUTCOME

The Final Outcome: A Success Story

The client now enjoys a **centralised, efficient, and error-free workflow**.

- **Real-time updates** are standard.
- **SOPs ensure consistency** in every job.
- **Manual tasks have been minimised**, reducing the risk of error.
- **Feedback-driven refinements** have made the system more intuitive.

What the Client Said

★★★★★

"Corient's internal application didn't just replace our spreadsheet—it changed how we work. Our workflow is smarter, faster, and more reliable"

Key Takeaways: Why This Matters for Businesses

- Manual systems don't scale—**automated platforms do**
- **Centralised control** enhances accuracy and collaboration.
- **Real-time updates** eliminate blind spots in workflow tracking.
- **Training and change management** are vital for successful digital transitions.
- Listening to **user feedback** drives system improvement.

A custom internal application can transform business chaos into a well-smooth operation.