



HOW TO FAST- TRACK YEAR-END ACCOUNTING JOBS: PROVEN WORKFLOW STRATEGIES FOR UK FIRMS

Highlights

- 1 Completed year-end jobs** within a strict **90-day deadline**
- 2 Reduced partner review time** by eliminating repetitive queries
- 3 Streamlined workflows** through early information collection and decision-making automation

Introduction

When a fast-paced accounting firm approached Corient, they had one clear objective: **complete all year-end jobs within 90 days**. However, challenges like **delayed client responses** and **inefficient internal reviews** threatened to derail this ambitious goal. That's when Corient stepped in to transform the chaos into a **streamlined and structured process**.



The Initial Problem: What Went Wrong?

The client faced multiple hurdles:

- **Delayed submission of key documents** from end clients
- **Repeated queries during partner reviews**, slowing down approvals
- **Unnecessary amendments** caused by incomplete or unclear information

Without a transparent system, the 90-day goal felt unachievable.

Corient's First Solution: The Fix

Corient responded by **reengineering the workflow**. We ensured:

- **All missing documents were requested upfront**, right at the start
- **Potential issues were identified early**, preventing last-minute surprises
- **Partner reviews became smoother**, as all key information was embedded into working files from the beginning

This proactive step **reduced email chains**, saved time, and improved accuracy.



The New Problem: A Surprise Roadblock

Despite improvements, new challenges emerged:

- **Significant delays** while waiting for client responses
- **Team uncertainty**, causing repetitive queries that slowed job progress

These issues created bottlenecks that could compromise delivery timelines.

Corient's Second Solution: Fixing the New Problem

To tackle the ongoing delays and repeated queries, Corient implemented a structured, two-part solution that delivered immediate results:

Step 1: Establishing KPIs

- **Defined key performance indicators (KPIs)** to monitor turnaround times at each stage of the process
- **Tracked waiting periods** for client documents to identify delays
- **Shared KPI insights with the client regularly**, enabling them to take timely action with end clients
- This step ensured **transparency, accountability**, and a data-driven way to push jobs forward

Step 2: Introducing a Decision-Making Matrix

- **Collaborated with the client** to create a robust decision matrix tailored to common review scenarios
- Enabled the team to **make informed decisions independently**, without needing to consult the client or end clients repeatedly
- **Reduced repetitive queries**, streamlining the workflow and increasing job efficiency
- Ensured **consistent, faster processing**, even when end client responses were delayed

By combining these two steps, Corient eliminated unnecessary back-and-forth, reduced review times, and kept the year-end process on track.

OUTCOME



The Final Outcome: A Success Story

- **Partner review times dropped** drastically.
- The firm **met its 90-day turnaround target**.
- End clients filed their accounts **on time and penalty-free**
- The team shifted focus to **strategic services and growth initiatives**.

What the Client Said



“Corient didn’t just help us meet deadlines—they helped us transform our entire process.”

Key Takeaways: Why This Matters for Businesses

- **Start strong:** Request all data early to reduce backlogs.
- **Empower your team:** Use decision matrices to enable quicker resolutions.
- **Track performance:** KPIs make bottlenecks visible and actionable
- **Reduce partner strain:** Streamlined reviews improve productivity.

With the right systems, even the tightest deadlines can become strategic opportunities.