



## Highlights

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



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#### 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.

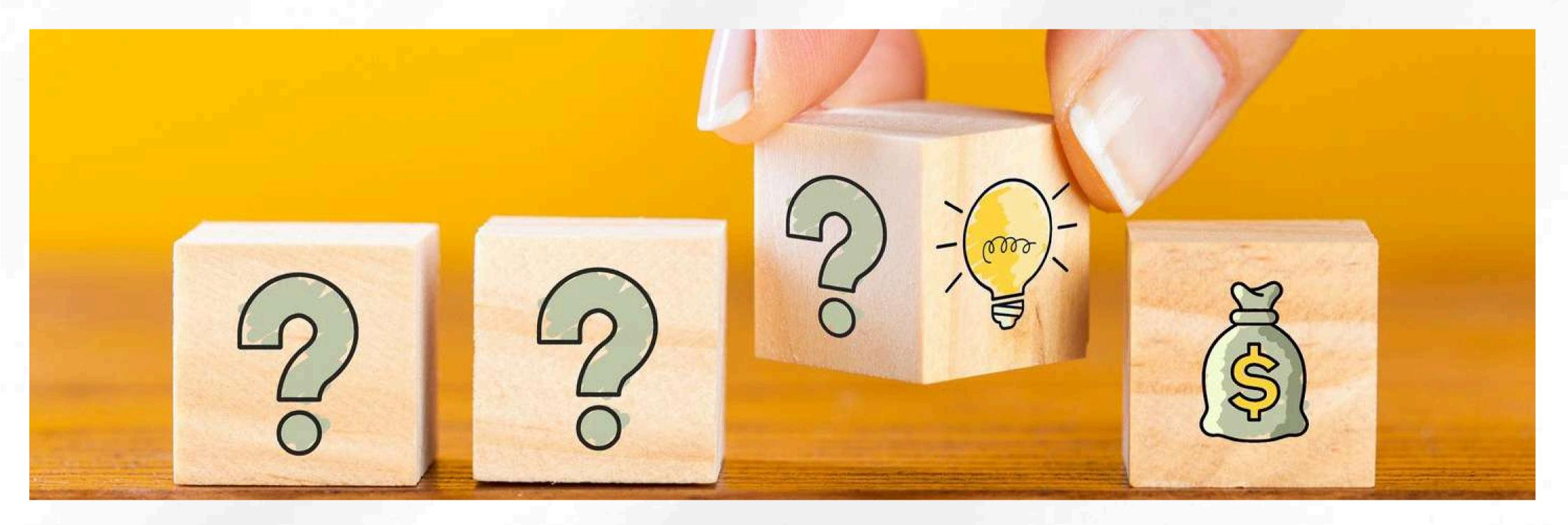


### Corient's First Solution: The Fix

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-andforth, 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.







"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.