

The Secret to Early Year-End Filings: How Corient Transformed an Overwhelmed Accounting Firm

Having the perfect timing with your activities
to fit your customer's buying cycles
will help you save money and maximize sales.

Highlights

- 1** Achieved early year-end filing by November, a whole month ahead of the deadline
- 2** Eliminated last-minute panic and overtime pressures
- 3** Boosted staff satisfaction and client retention
- 4** Improved workflow efficiency through strategic planning and training

Introduction

For most accounting firms, the final quarter of the year is synonymous with **stress, overtime, and rushed filings**. With March 31st as the financial year-end and December as the filing deadline, firms often find themselves overwhelmed. One such firm faced this exact challenge—until they partnered with **Corient Outsourcing** to completely transform their year-end operations.



The Initial Problem: What Went Wrong?

The firm was struggling to meet statutory deadlines due to:

- **Clients are delaying the submission** of financial documents
- A sudden **surge of workload in Q4**, leading to bottlenecks
- **Internal staff burnout** from extended hours and poor workflow planning
- Occasional missed deadlines, hurting the firm's reputation

The absence of structured processes and early planning made it impossible to function efficiently under pressure.

Corient's First Solution: The Fix

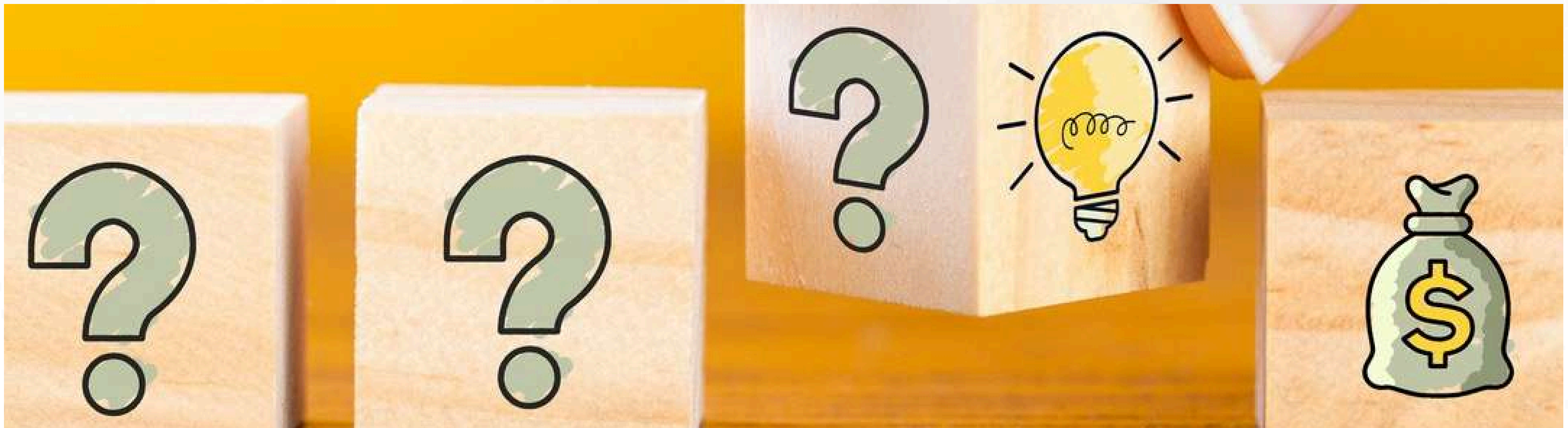
To resolve inefficiencies, Corient introduced key process improvements:

Annual Workflow Planning to balance workloads across the year.

Proactive Client Communication with early submission guidance and automated reminders.

Quarterly Bookkeeping to keep financials current and reduce year-end pressure.

This streamlined approach allowed **early year-end** preparation, easing Q4 stress. Learn how structured payroll support helps in our [payroll outsourcing services](#).



The New Problem: A Surprise Roadblock

While processes improved, the firm encountered new challenges:

- **Client Procrastination Persisted:** Some clients continued to send data close to deadlines, ignoring the new schedules.
- **Resistance to Change:** Staff needed time and support to adapt to new workflows and communication patterns.

To achieve a fundamental transformation, Corient needed to delve deeper into behavioral change and staff enablement.

Corient's Second Solution: Fixing the New Problem

To overcome these roadblocks, Corient deployed a detailed action plan:

Step 1: Client Education Campaign: Regular updates, emails, and webinars provided clients with information on the risks of late submission and the benefits of early compliance.

Step 2: Define Deadlines and Expectations: Clear submission deadlines were communicated to clients well in advance, along with automated reminders to ensure timely completion.

Step 3: Customised Staff Training: Corient delivered **targeted training sessions** for the firm's team on the new workflows, tools, and escalation paths.

Step 4: Ongoing Support and Review: Frequent check-ins ensured any **operational issues** were promptly addressed, keeping the new system on track.

Step 5: Workflow Monitoring: Corient tracked task progression and client responsiveness to fine-tune workload distribution throughout the year.

Through these steps, both staff and clients transitioned successfully to a proactive, organised year-end workflow. To see how Corient handles complex process transitions, explore our expertise in [payroll error correction](#).

OUTCOME



The Final Outcome: A Success Story

The results were transformational:

- **All filings were completed by November**, one month ahead of the statutory deadline
- **Overtime and staff burnout dropped significantly**, with a boost in team morale
- The firm reported **stronger client retention and more referrals**, as clients appreciated the improved service delivery

What the Client Said



"Partnering with Corient was the best strategic move we made. Their structure, support, and professionalism took the chaos out of our year-end process."

Key Takeaways: Why This Matters for Businesses

- **Proactive planning eliminates year-end bottlenecks**
- **Quarterly processes keep workflows smooth and stress-free**
- **Expert outsourcing partners like Corient can radically transform operations**

With the right strategy, year-end chaos becomes year-round confidence.