



How One Accounting Firm Cut Year-End Delays by 30 Days with Workflow Transformation

Highlights

- 1 Reduced document delays by **25–30 days**
- 2 Year-end accounts completed in **under 120 days**
- 3 Standardised working papers across client teams
- 4 Less stress, more structure, and faster client delivery



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Introduction

Every accounting firm knows the pressure that builds as year-end approaches. But for one UK-based firm, the crunch had become a constant. With clients slow to provide documents, inconsistent internal processes, and no central system to track progress, the team found themselves stuck in a cycle of last-minute filings and rising anxiety. Even though they chased clients diligently, bottlenecks continued to recur. They needed more than hard work—they needed **a more innovative, more structured way forward.**



The Initial Problem: What Went Wrong?

Several key issues were holding the team back:

- **Client delays:** On average, it took **four months post-year-end** to receive essential documents.
- **Last-minute filings:** Accounts were often completed and filed in the final few days before the deadline.
- **Disorganised documentation:** Working papers varied across client managers; previous year data was inconsistent.
- **Lack of visibility:** Without a central system, it was hard to know which jobs were delayed, complete, or stuck.

The result? High stress, rushed work, and increasing pressure on both staff and clients.

Corient's First Solution: The Fix

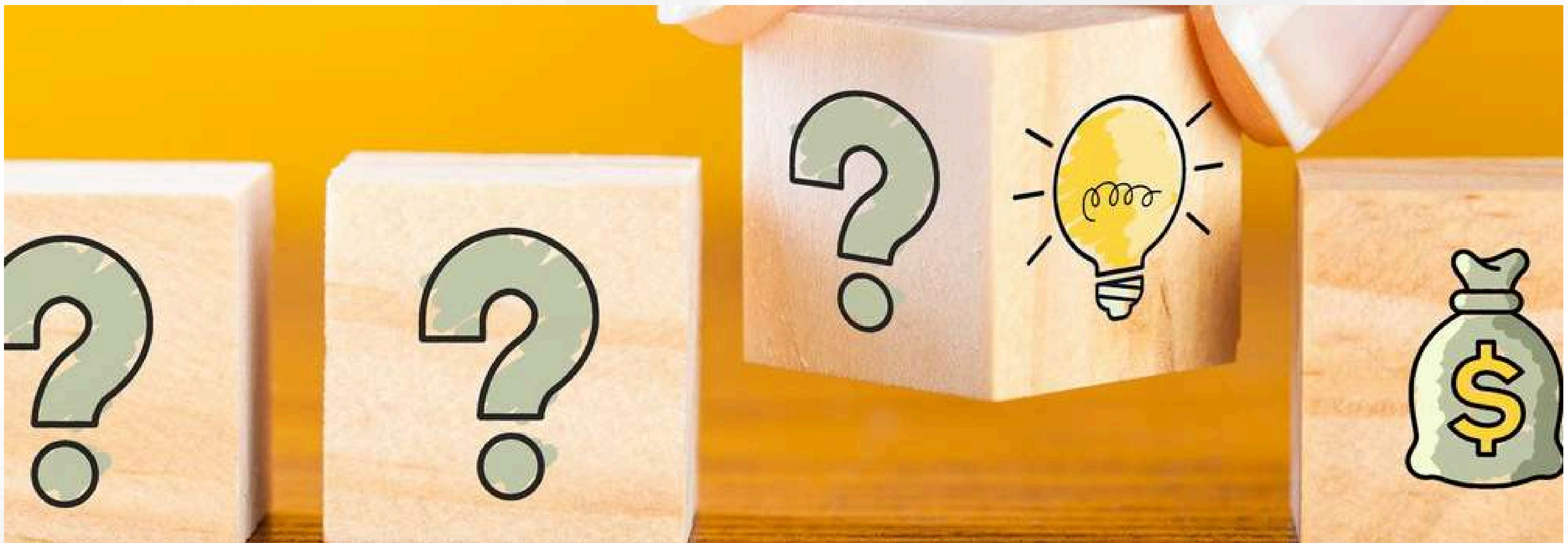
Corient began by making small but powerful changes to the firm's internal processes.

1. Standardised Working Papers

A single template was introduced for all client managers. This eliminated confusion, saved review time, and improved the overall quality of documentation.

2. Introduced Basic Workflow Visibility

Rather than a complete tech overhaul, Corient implemented a **simple tracking system** to monitor key dates and job statuses. This gave the team visibility on progress and bottlenecks from the month of year-end onward. These early changes helped the firm feel more in control—and laid the groundwork for deeper improvements.



The New Problem: A Surprise Roadblock

As the system improved, a **new issue emerged**.

Some jobs were marked “on hold” due to missing documents—but no one was actively following up. These jobs quietly accumulated, delaying completions despite improved tracking.

It was a classic case of **out of sight, out of mind**.

Corient's Second Solution: Fixing the New Problem

To address this, Corient helped the firm implement a **follow-up framework** that created accountability and visibility.

Step 1: Weekly Job Review Meetings – Client managers discussed pending jobs during weekly team meetings, specifically focusing on those marked “on hold.” This kept follow-ups front and centre.

Step 2: Document Checklists Sent Quarterly – For clients with in-house bookkeeping, Corient recommends sending quarterly checklists for items such as **bank statements** and **VAT/PAYE reports**. This spread the workload throughout the year, avoiding last-minute scrambles.

Step 3: Centralised Follow-Up Tracker – A shared tracker recorded all pending items and client conversations, so everyone knew where things stood—and no job got forgotten.

OUTCOME



The Final Outcome: A Success Story

The results were clear and measurable:

- **Turnaround time for year-end accounts dropped to under 120 days**
- **Document delays reduced by over 25 days**, thanks to quarterly check-ins
- **Team stress levels dropped**, replaced by a calmer, proactive approach
- **Working paper quality improved**, leading to smoother reviews and better client outcomes

What the Client Said



"Corient didn't just clean up our process—they gave us clarity. We no longer chase deadlines; we manage them. The whole team feels more confident."

Key Takeaways: Why This Matters for Businesses

- **Standardising processes** is a low-effort, high-impact improvement
- **Quarterly document requests** prevent year-end data pile-ups
- **Consistent follow-ups** are just as important as tracking tools
- **Even simple systems** can improve efficiency when adopted firm-wide
- Strategic support is crucial for accounting firms seeking to expand.

Corient's approach aligns with the Future of Accounting, where innovative processes and automation play a central role—not just in productivity, but also in overall well-being.