



How Corient Transformed an Accounting Firm's Workflow Management with Automation and GDPR Compliance

Highlights

- 1 100% visibility** into task statuses and deadlines
- 2 Complete automation** of workflow tracking
- 3 GDPR compliance** ensured with secure systems
- 4 Centralised dashboard** for job management



+44 24 7610 3333



www.corientbs.co.uk



The Techno Centre, Puma Way, Coventry, CV1 2TT, United Kingdom

Introduction

At a bustling **Accounting Firm**, operations ran on tight schedules and precise deliverables. However, behind the scenes, a silent storm brewed—**manual workflows**, outdated tracking via spreadsheets, and mounting pressure to meet **GDPR compliance**. These operational cracks were growing wider, and the leadership knew it was time for a transformation. That's when Corient stepped in.



The Initial Problem: What Went Wrong?

Despite best efforts, the firm's reliance on **Google Spreadsheets** for workflow tracking led to:

- **Inconsistent or missing data entries**
- **Poor visibility** of expected deliverables
- **Untracked priority changes**, causing confusion
- **Manual date logging** is prone to errors
- **Potential GDPR risks** due to unsecured data handling

The lack of a centralised system was not just causing inefficiency—it was threatening client trust.

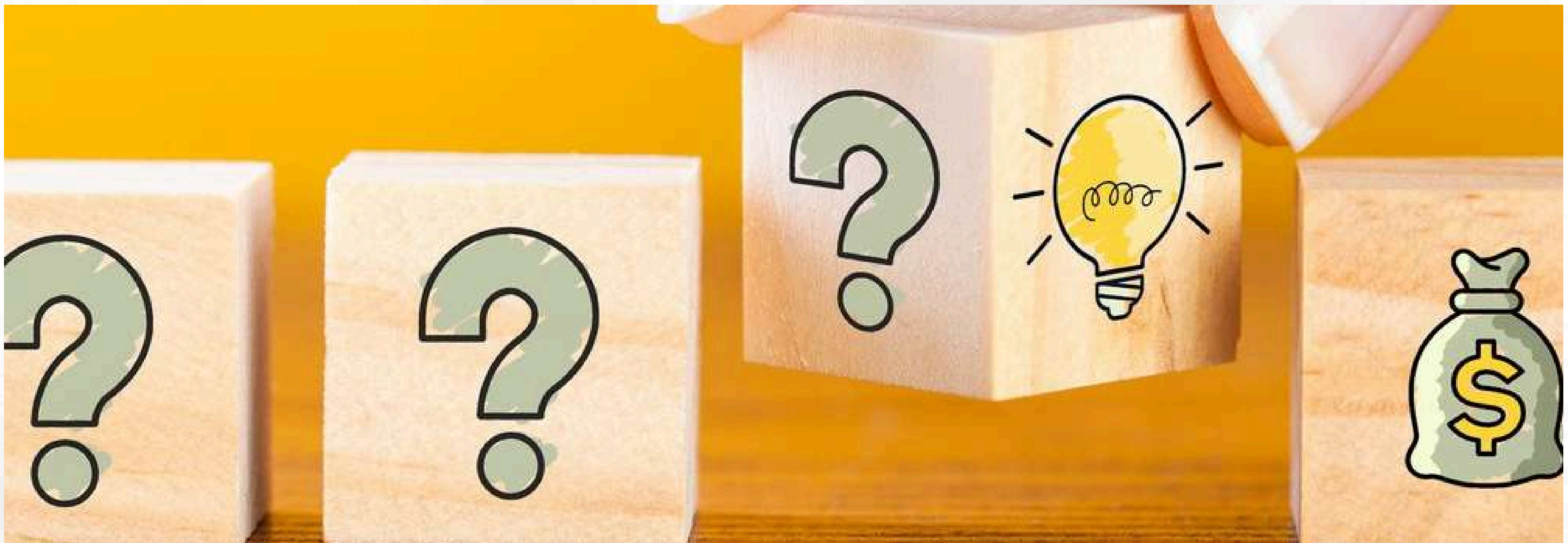
Corient's First Solution: The Fix

The Accounting Firm turned to **Corient's accounting outsourcing services** for help. After in-depth consultations, Corient devised and deployed a **custom online workflow management system**.

This system offered:

- A **centralised platform** to add jobs, upload documents, and track progress
- Integrated **year-end checklists**
- **Automated job status updates**
- Improved **collaboration and accountability**

With this setup, data entry errors plummeted, and team coordination improved overnight.



The New Problem: A Surprise Roadblock

Just as things were settling, a **new challenge emerged**.

Although the new platform was operational, many employees struggled to adapt. They were accustomed to spreadsheets and found the shift intimidating. The **lack of training** threatened to undercut the benefits of the system.

Corient's Second Solution: Fixing the New Problem

To address this hurdle, Corient quickly rolled out a **step-by-step resolution**:

Step 1: Conducted interactive workshops to familiarise staff with the new interface

Step 2: Created visual guides and video tutorials for easy reference

Step 3: Implemented a support chat function within the system

Step 4: Ran weekly feedback sessions to address user concerns

Step 5: Assigned workflow champions within teams to support peers

This proactive approach transformed user hesitation into confidence.

OUTCOME



The Final Outcome: A Success Story

The Accounting Firm experienced:

- **Complete transparency** across job assignments
- **Streamlined processes** and reduced delays
- **Improved compliance** and secure data handling
- Accurate tracking of **billable hours and resource usage**

What the Client Said



“Corient’s solution didn’t just fix our problems—it changed how we work. We now run smoother, safer, and faster. Their team went above and beyond.”

Key Takeaways: Why This Matters for Businesses

- Embracing **technology** can eliminate repetitive tasks and manual errors
- **Training and support** are essential in driving the adoption of new systems
- Investing in **tailored automation** results in long-term efficiency gains

One tailored solution can future-proof your operations.