



From Admin to Advisory: Corient's Workflow Transformation for Client Managers

Highlights

- 1** **50% reduction in review time** for client managers
- 2** **Zero time spent on training** and people management
- 3** **Enhanced client relationships** and business growth
- 4** **Seamless transition** to an advisory-focused model



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Introduction

Client managers at a leading accounting firm were **overwhelmed** by administrative responsibilities that were pulling them away from what they did best—**offering strategic advice** to clients. This case study reveals how Corient Solutions transformed their workflow, allowing them to focus on **value-added advisory services**.



The Initial Problem: What Went Wrong?

The firm was facing a **productivity crisis**. Their client managers were:

- Stuck with **non-advisory tasks** like staff training and query resolution
- Spending **4–5 hours per job** on reviews
- Constantly managing staff performance and development
- Unable to focus on **client advisory work**, their actual area of impact

As the operational load grew heavier, their ability to provide **proactive insights and value** to clients diminished.

Corient's First Solution: The Fix

Corient stepped in with a **targeted strategy** designed to alleviate the operational bottlenecks.

- Introduced **streamlined review processes**, cutting review times in half
- Took over base-level accounting work via **Accounting Outsourcing Services**
- Completely removed the need for staff training and people management
- Freed up client managers to focus solely on **advisory interactions**



The New Problem: A Surprise Roadblock

However, the firm faced an **unexpected challenge**. With newly freed-up time, client managers were unsure how to **transition from operational roles to advisory ones** effectively. The gap in **advisory skills development** became evident.

Corient's Second Solution: Fixing the New Problem

Corient implemented a **step-by-step transformation plan**:

Step 1: Assessment Workshops: Evaluated current skill levels and advisory readiness

Step 2: Advisory Training Modules: Created custom learning paths for advisory consulting

Step 3: Mentorship: Provided ongoing support with real-time case handling

Step 4: Workflow Optimisation: Embedded best practices from **Advisory and Consulting Services** into daily routines

Through this, client managers gained the **confidence and structure** to step into their new roles.

OUTCOME



The Final Outcome: A Success Story

Client managers not only embraced their **new advisory focus** but also began delivering insights that led to measurable business growth for clients.

What the Client Said



"Corient helped us not only get our time back but also redefine our purpose as advisors. We're finally doing the work we love and making a greater impact."

Key Takeaways: Why This Matters for Businesses

- **Time Efficiency:** Outsourcing routine tasks can significantly reduce review time and free up leadership bandwidth.
- **Strategic Focus:** Enables client managers to transition from operational roles to **high-impact advisory services**.
- **Improved Client Relationships:** Dedicated advisory time results in better client satisfaction and retention.
- **Scalable Growth:** A streamlined, advisory-focused model sets the foundation for **sustainable business expansion**.

Outsourcing is not just about saving time—it's about **unlocking your firm's full potential**.