



How Xero Migration & Outsourced Bookkeeping Boosted Profits for a Coventry Accounting Firm

Highlights

- 1 Migrated seamlessly to Xero** with no prior in-house expertise
- 2 Reduced bookkeeping costs** and turned the service into a profit centre
- 3 Real-time bookkeeping** enabled faster accounts preparation and timely VAT reporting
- 4 End client satisfaction increased** with structured processes and timely reports



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Introduction

For growing accounting firms, managing back-office operations while keeping clients happy is no easy task — especially when outdated systems and manual bookkeeping eat up valuable resources.

A Coventry-based accounting firm faced this exact challenge. With expensive in-house bookkeeping and no internal experience using cloud accounting tools, they knew it was time for a change. That's when they partnered with **Corient** — not just to implement a new system, but to transform how they operated.



The Initial Problem: What Went Wrong?

The firm had several operational bottlenecks:

- **No prior knowledge of Xero**, though they had chosen it as their preferred cloud platform
- **High in-house bookkeeping costs** that were cutting into profitability
- **Backlogs and delayed reporting**, leaving end clients frustrated and under-informed

They needed a complete shift — but didn't know where to begin.

Corient's First Solution: The Fix

Corient began with a comprehensive review of the firm's existing processes and systems. From there, the transformation started:

1. **Evaluated the current finance and accounting setup** to identify inefficiencies
2. **Cleaned up and corrected backlogged accounts**, ensuring accuracy
3. **Migrated all data to Xero seamlessly**, allowing for cloud-based, real-time access

This established the foundation for a modern, streamlined workflow. But after migration, a new hurdle emerged.



The New Problem: A Surprise Roadblock

Although the technical migration was successful, the firm continued facing:

- Delays in receiving client documents
- Unstructured month-end workflows
- Overloaded on internal staff, unable to keep up with daily bookkeeping tasks

Corient recognised that the challenge had shifted from technology to process management.

Corient's Second Solution: Fixing the New Problem

Corient stepped in with a practical, scalable solution tailored to the firm's needs:

Step 1: Developed a month-end checklist to standardise data collection and timelines

Step 2: Took over bookkeeping directly for the end clients, reducing staff burden

Step 3: Implemented real-time bookkeeping processes, eliminating delays

Step 4: Enabled quicker accounts preparation and reporting, creating a smooth monthly cycle

The result? A dramatic improvement in efficiency, cost savings, and client satisfaction.

Firms looking for similar operational upgrades can explore [top payroll outsourcing companies in the UK](#) to see how strategic partnerships drive profitability.

OUTCOME



The Final Outcome: A Success Story

By partnering with Corient, the firm experienced a complete turnaround:

- **Bookkeeping costs were slashed**, instantly improving profit margins
- **Xero was fully adopted** without hiring new in-house staff
- **Accounts were prepared within days**, not weeks
- **Clients received timely VAT returns and management reports**

What the Client Said



“Corient didn’t just help us move to Xero — they helped us build a better business. We’re more efficient, more profitable, and our clients are happier than ever.”

Key Takeaways: Why This Matters for Businesses

- You don’t need in-house software expertise to go digital — you just need the right partner.
- Structured processes + real-time bookkeeping = faster reporting and happier clients
- Outsourcing can **turn cost centres into profit centres**

With technology driving so many improvements, even small changes — like implementing AI in payroll — can lead to significant performance gains.

Transform your operations. Save costs. Grow with confidence.