



Enhancing Sales Progression Efficiency for a UK-Based Property Services Company

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Introduction

A UK-based company specializing in sales progression services for the property market approached Corient Business Solutions to address challenges in managing their growing workload. They provide services to estate agents, auction houses, and mortgage brokers by streamlining the legal and administrative processes involved in property transactions. To support their Sales Progression team, the client sought an additional resource to handle the increasing volume of administrative tasks, particularly the processing of memos.



The Problem?

- The client experienced an overflow of memos from their customers, which their existing team could not manage efficiently.
- These memos came in various formats, including handwritten documents, which were difficult to read and process.
- Many memos lacked crucial information, leading to delays due to follow-up communications.



**The best accountants
are the architects of
financial legacies.**

– Laura Anderson



Corient Solution

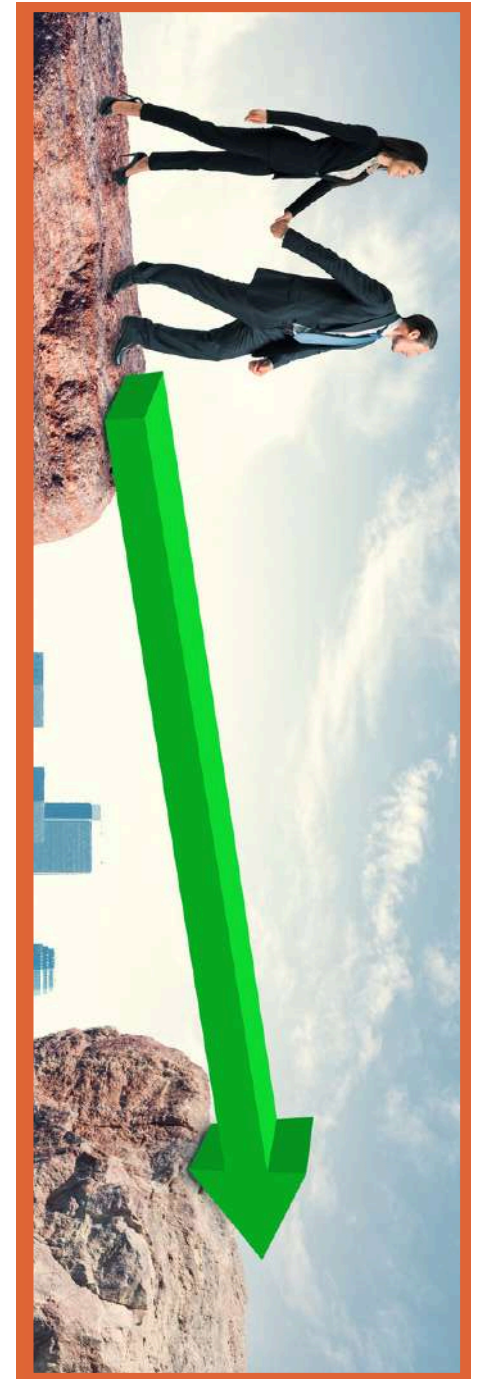
- Corient offered support by allocating resources to manage the memo processing workload effectively.
- Currently, Corient handles approximately 500 memos per month, ensuring timely processing and accuracy.
- Proposed the idea of a standardized memo template to streamline the submission and processing of memos.

Challenges Faced

- Customers and agents used their own unique formats for memos, adding complexity to the processing workflow.
- Some memos were handwritten, leading to readability issues.
- Missing information in memos caused delays, requiring additional follow-ups with clients.

Overcoming the Challenges

- Collaborated with the client's Direct Point of Contact (POC) to suggest a standardized memo template for all agents and customers.
- The client agreed to implement the template, ensuring uniformity in memo submissions.
- This proactive approach resolved issues related to formatting inconsistencies and missing information.



**Behind every good
business is a great
accountant.**

– Anonymous

Result Achieved

- Standardized memo submissions ensured all memos were received in a consistent format, reducing processing time.
- Improved accuracy and efficiency in processing memos, eliminating delays caused by follow-ups.
- Accelerated turnaround time (TAT) for processing, enhancing workflow efficiency.

Conclusion

Corient Business Solutions successfully addressed the client's challenges by providing an additional resource and introducing a standardized memo template. This solution streamlined memo processing, improved accuracy, and enabled faster turnaround times, ultimately helping the client manage their growing workload efficiently. The collaboration reinforced Corient's commitment to delivering tailored and impactful solutions for its clients.



**The road to success and the road to failure
are almost exactly the same.**

– Colin R. Davis

