



Streamlining Client Communication and Management for Enhanced Capacity

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Introduction

A client approached Corient to address their in-house capacity challenges in managing and communicating effectively with their end clients. The lack of streamlined processes and standard operating procedures (SOPs) was hindering their ability to handle critical tasks like payroll, VAT filing, and year-end work. Corient's expertise in process optimization and communication management provided the client with the needed solutions to overcome these challenges and achieve sustainable growth.



The Problem?

- The client struggled with limited in-house capacity to manage and communicate with their end clients.
- There were no defined SOPs or structured notes to facilitate efficient query resolution.
- The absence of a clear process led to delays and inefficiencies in client servicing.

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

– Laura Anderson

Corient Solution

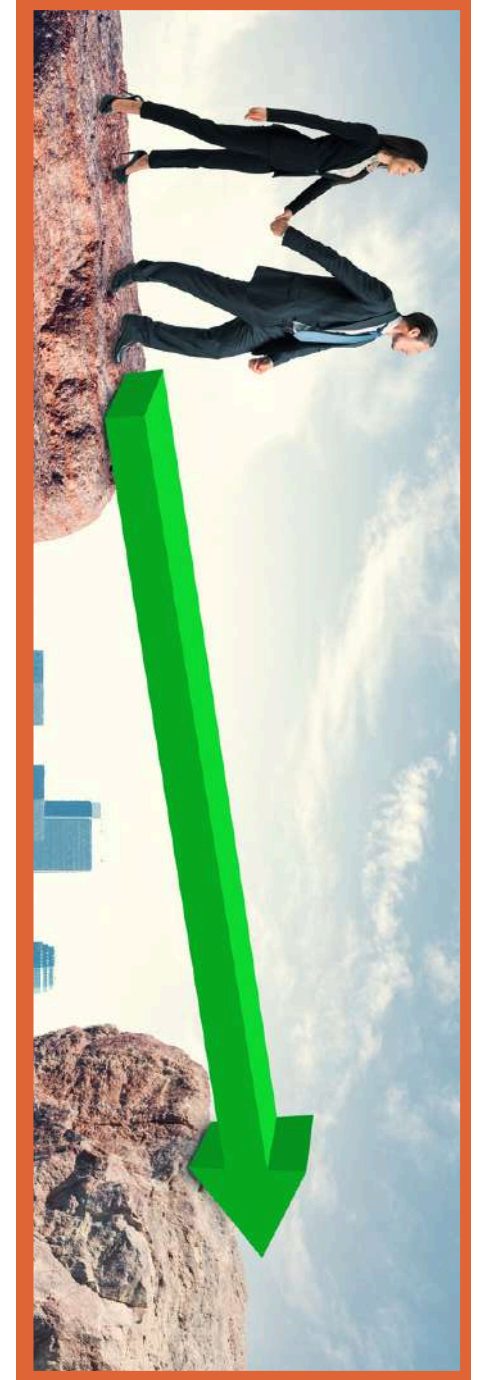
- Conducted a thorough analysis to identify the skill sets required to address the client's needs.
- Designed a structured process to chase information and resolve queries from end customers effectively.
- Established monthly catch-up sessions with end clients to set priorities, minimize queries, and maintain clear communication.
- Introduced the E2E application for seamless task management, ensuring end clients faced no issues during usage.

Challenges Faced

- The lack of SOPs or predefined notes with the end clients created initial inefficiencies.
- Understanding the unique operating procedures of each end client was a complex and time-intensive task.

Overcoming the Challenges

- Organized workshops with the end clients to gain a deep understanding of their business operations and specific requirements.
- Explained Corient's processes and proposed a streamlined process flow to align operations between both parties.
- Documented SOPs and created detailed notes to standardize processes for long-term efficiency.



Behind every good business is a great accountant.

– Anonymous



Result Achieved

- The client expressed satisfaction with Corient's services and provided additional work for payroll, VAT filing, and year-end filing.
- The E2E application enabled smooth task execution, with no challenges faced by the client or their end customers.
- The client successfully onboarded over 20 new clients, significantly boosting their capacity and revenue potential.

Benefits Achieved to the End Clients

- With SOPs and notes in place, processes were streamlined, reducing the time required to resolve queries.
- Up-to-date bookkeeping allowed the client to have VAT and PAYE (pay as you earn) liabilities ready well in advance, ensuring compliance and efficiency.
- Improved communication processes enhanced client relationships, providing a foundation for future growth.

Conclusion

Corient's process-oriented approach transformed the client's capacity management and communication processes. By addressing key inefficiencies, introducing structured workflows, and leveraging the E2E application, Corient empowered the client to streamline their operations, onboard new clients, and deliver enhanced value to their end customers. The case study exemplifies Corient's commitment to the firm's core values and mission - A Client Oriented Company for all.