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Case Study

Transactions Reconciled:

A Bookkeeping Firm's Partnership with Corient



Highlights

1. A bookkeeping firm partnered with CorientBS for six client cleanup projects involving 16,564 transactions in October 2026.
2. The partner rated accuracy, senior review quality and value for price at 4.5 out of 5 each, and overall satisfaction at 4.5.
3. Turnaround was the one area to improve (4 out of 5), after Corient's team received more clients at once than it had planned for.
4. The partner has committed to monthly volumes from November 2026 through June 2027.

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Introduction

A bookkeeping firm can only grow as fast as its delivery capacity. The partner, a bookkeeping firm, serves its own client base, and needed a dependable outsourced team to clean up and reconcile client books without lowering the standard those clients expect.

In October 2026, the partner gave Corient Business Solutions its first batch: six cleanup jobs covering 16,564 transactions. The partner then committed to monthly volumes from November 2026 through June 2027, and asked for a candid review of the October work before that volume ramped up. This case study is built from that review.



The Initial Problem: What Went Wrong?

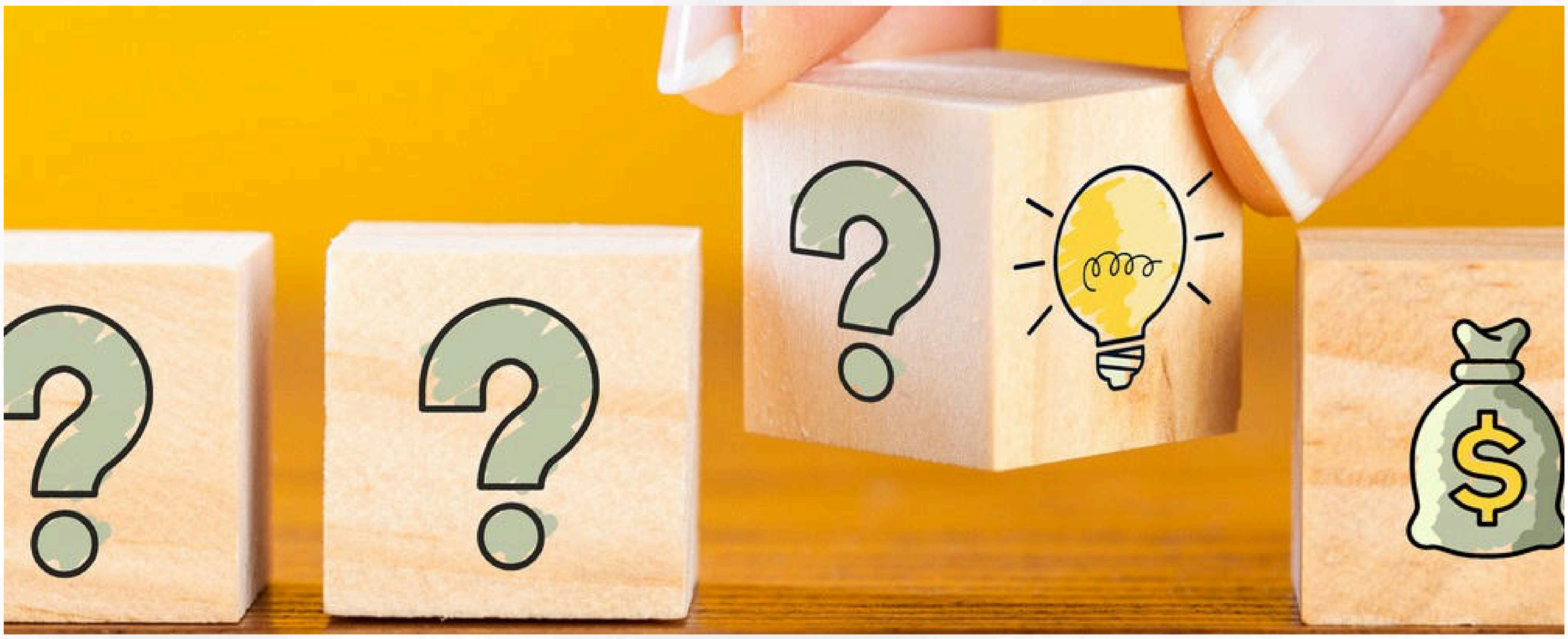
- Client books needed categorisation and reconciliation cleanup, six jobs and 16,564 transactions in the first batch.
- The partner needed a delivery team whose output was accurate enough to reach its clients without correction.
- The partner had no shared, live view of which clients' work was complete or which documents were still outstanding.
- Monthly volumes were about to begin, so the partnership had to prove it could scale.

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Corient’s First Solution: The Fix

Corient's delivery team took on the October jobs with a senior-review model built around the client's documentation:

- Categorised transactions and completed reconciliations across all six jobs.
- Ran every job through senior review, which set out in detail what each client still needed to provide.
- Set up a simple hand-off so the partner could share files and access with minimal friction.
- Keep the partner informed with regular status updates and quick answers to questions.



The New Problem: A Surprise Roadblock

The first batch showed where the process strained:

- Corient's team had planned for a smaller workload and received 17 clients overnight, so turnaround ran slower than the partner expected.
- One client sent its documents late, and its two entities moved money back and forth, which meant the most back-and-forth of the six jobs.
- The research and initial document request from the senior review team took too long for new clients, delaying the start of work.
- The partner rated how well Corient understood its standards and client types at 3 out of 5.

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Corient's Second Solution: Fixing the New Problem

After the survey, the two teams agreed a direction for the monthly work:

- Sit down together to redesign the research and initial document request step so new clients start faster.
- Move to a shared tracker where the partner can see live which client work is being completed and what each client still needs to supply.
- Connect Corient to the partner's FinancialCent system so automated email and SMS follow-up reaches clients who are late with documents.
- Add research on the partner side for new clients, ahead of hand-off to Corient.
- Keep one named contact at the partner for day-to-day questions and escalations for the next two to three months, until the partner's planned Client Success Manager takes over client communication.



The Final Outcome: A Success Story

- Delivered accurate categorisation and reconciliations across six jobs and 16,564 transactions, rated 4.5 out of 5.
- Provided senior review that told each client exactly which documents to supply, rated 4.5 out of 5.
- Made the hand-off effortless, with file and access sharing rated 5 out of 5.
- Delivered strong value for the price, rated 4.5 out of 5, with responsiveness and status updates also at 4.5.
- Earned a commitment to monthly volumes from November 2026 through June 2027, with overall satisfaction at 4.5 out of 5

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Beyond the fix, Long-term benefits delivered:

- A committed eight-month pipeline (November 2026 to June 2027) gives both teams room to tune the process.
- Shared live tracking will give the partner visibility into every client's status and missing documents.
- Automated client follow-up through FinancialCent will cut the delay from late documents.
- A planned Client Success Manager at the partner will own client communication, leaving Corient to focus on the books.
- With the bookkeeping bottleneck solved first, the partner can consider sending more services, such as payroll, to Corient.

Key Takeaways: Why This Matters for Businesses

- Accuracy wins the partnership, but turnaround decides how much work follows. The partner named turnaround, not quality, as the main condition for increasing volume.
- Client readiness sets the speed. The smoothest job was the one where the client supplied every document up front; the hardest had late documents and two entities moving money between them.
- A sudden surge, such as 17 clients overnight, needs capacity planned before it lands, not after.
- A shared live tracker beats status emails: both teams see what is done and what the client still owes.
- A delivery partner needs to learn your standards and client types before the work arrives, not during it.
- Fix the bottleneck before adding services. The partner has clients interested in payroll but wants the bookkeeping flow working first.

Growing bookkeeping firms outpace their delivery capacity all the time. With a fast intake, live tracking and a senior review that tells clients exactly what to send, Corient gives partners a delivery team they can scale on.

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What the Client Said



★★★★★

"Most of the work is accurate and correct. Overall the senior review explains in detail what the client needs to provide. Overall the price is good for the work that is being performed. We look forward to developing our business relationship further with Corient."

Management, Bookkeeping Firm Partner