



How Corient Helped a US-Based Client Streamline AP, Taxation & Commission – Unlocking Efficiency & Growth



+1-302-498-8332



www.corientbs.com



The Mill Space, 1007 N. Orange st., Wilmington, DE 19801,
United States

Introduction

A leading US-based company providing communication solutions approached Corient Business Solutions to support their Commission, Taxation, and Accounts Payable (AP) processes. They were looking for a cost-effective solution and a business continuity plan (BCP) to streamline their operations. With frequent process changes and limited documentation, they needed a reliable, skilled team to manage their critical financial functions efficiently.

The Problem?

1. The client wanted to reduce operational costs while ensuring uninterrupted support for their finance functions.
2. Their finance team needed a structured BCP (Business Continuity Plan) to manage workload fluctuations and ensure seamless financial operations.
3. There were no existing Standard Operating Procedures (SOPs) or documentation, leading to inconsistencies in managing AP, Commission, and Taxation processes.

Corient Solution

1. **Skill Gap Analysis & Dedicated Resource Deployment** – Corient conducted a competency mapping exercise to assess the expertise required and assigned a dedicated team to work directly with the client’s finance department. This ensured the right skills were aligned with their needs.



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

– Laura Anderson

2. **Real-Time Communication & Collaboration** – To ensure seamless workflow, Corient’s team mirrored the client’s working hours, allowing for immediate responses to queries, faster issue resolution, and improved coordination.

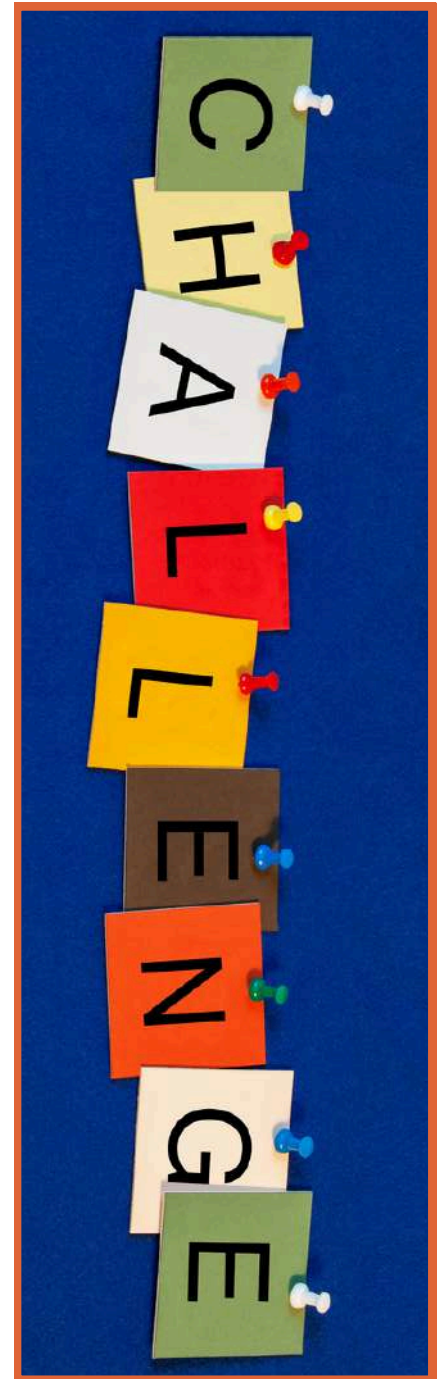
3. **Regular Check-Ins for Process Optimization** – Corient established bi-weekly performance syncs with the client to discuss workflow improvements, address challenges, and maintain efficiency, ensuring smooth financial operations.

Challenges Faced

1. The absence of SOPs or structured notes made it difficult to onboard new resources efficiently.
2. The client’s requirements frequently changed, impacting resource planning and onboarding timelines.
3. Ensuring alignment between Corient’s team and the client’s processes required additional coordination to streamline expectations.

Overcoming the Challenges

1. **Calibration Calls for Requirement Alignment** – Corient introduced structured calibration calls, where the client and Corient’s team discussed key expectations, clarified process nuances, and ensured role alignment. These calls helped refine workflows and eliminate ambiguities.
2. **Transparent Communication & Process Education** – Corient provided step-by-step walkthroughs of how tasks would be handled, ensuring the client clearly understood the workflow, leading to better collaboration and smoother execution.
3. **SOP Development & Knowledge Documentation** – Corient developed comprehensive Standard Operating Procedures (SOPs) with detailed process flows, approval hierarchies, and escalation points, allowing for standardized and scalable financial operations.



“
Behind every good
business is a great
accountant.

– Anonymous
”

Result Achieved



1. The client was highly satisfied with the AP resource performance and approved the addition of two more team members to further strengthen their finance operations.
2. With increased capacity and specialized skills, the client's internal team could now focus on acquiring new customers and expanding their business.
3. The structured approach to documentation and knowledge transfer significantly reduced onboarding time, minimized process deviations, and improved overall efficiency.



Conclusion

By optimizing financial operations, enhancing communication, and implementing structured process controls, Corient enabled the client to achieve cost efficiency, operational continuity, and seamless knowledge transfer. The partnership not only streamlined their Commission, AP, and Taxation workflows but also allowed them to scale their business without operational roadblocks.



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

– Colin R. Davis

