CORIENT
Customer Oriented Company

CASE STUDY

From a 6-Job Trial to an 8-Month Partnership: How a US Bookkeeping Firm Scaled Its Cleanup Work

A simple story about clean books, a busy month and a partnership built to last.



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Meet the Firm

This is a bookkeeping firm in the USA. It looks after the accounts of small businesses, and it was growing fast. New clients were signing up all the time, and that was great news.

But there was a catch. A bookkeeping firm can only grow as fast as the team doing the work. The firm had more client books to tidy up than it had hours in the day.

The problem

Many of the new clients had messy books. Every payment and purchase had to be sorted into the right type. Then each account had to be checked against the bank, to make sure the numbers matched.

It is careful, detailed work, and there was a lot of it. The firm also had no easy way to see which clients were finished and which were still waiting to send over paperwork.

The firm needed a team it could trust, one that would get the work right the first time so the firm's own clients never had to see a mistake.

Why the Firm Came to Corient

The firm did not need another supplier to manage. It needed a team that could take the cleanup work off its plate, without lowering the standard its own clients expect.

Three things mattered most:

Work it could trust.
The books had to be accurate enough to go back to the firm's clients without being redone.

Clear instructions for clients.
The firm wanted a review that spelled out, in plain terms, exactly what each client still needed to send in.

A partner to grow with.
The firm wanted to sort out its bookkeeping flow first, then look at adding other services, such as payroll, as it grew.

So, it started with a small first batch, to see whether Corient could deliver.

The first test

In October 2026, the firm gave Corient its first batch:

6
Client Jobs

16,564
Transactions and start check



That works out at roughly 2,760 transactions per job.

Corient got to work. Every job was sorted and checked, and then a senior team member reviewed it. That review also spelled out, in plain terms, exactly what each client still needed to send in.

What went well

The firm was happy with the quality. It scored Corient like this (out of 5):

4.5	4.5	4.5	4.5	4.5
Accuracy	Senior review	Value for money	Quick answers & clear updates	How easy it was to share files & access

The whole project cost $4,140. That is about **$690 per job, or roughly 25 cents per transaction.** The firm said the price was good for the work.

One job ran especially smoothly.

The client sent every document on day one, so the team could start straight away. It shows how much faster things go when the paperwork is ready.



What got in the way

A few weeks into the trial, the firm moved 17 backlogged clients over to us at once.

Corient had planned for a smaller workload, so the jump was a real surprise. The team did its best, but turnaround was slower than the firm hoped. It scored 4 out of 5, the lowest mark for delivery.

Two other things slowed the work down:

Late paperwork.
One client was slow to send documents. They also ran two businesses that moved money back & forth between them, which made the books harder to untangle. This job needed the most back-and-forth.

A slow start for new clients.
The first step, researching the client & asking for their documents, took longer than it should. The firm also gave Corient 3 out of 5 for understanding its standards & the types of client it serves.

The firm was kind but honest about this. Its message was simple: the work is good, but it needs to start faster.

The fix

Here is what Corient changed, and who owns each step:

- We rebuilt onboarding so new clients start within 14 days.
- We set up a shared live tracker so both teams can see progress and what each client still owes.
- We enter data into the firm's CRM, so it sends automatic reminders to clients who are late with documents.
- We agreed a short intake checklist with the firm for each new client.
- We now have one point of contact on each side. At the firm, one named person answers day-to-day questions for the next two to three months, until the firm's own Client Success Manager takes over.



The result

The firm decided to keep going. It has committed to monthly work from November 2026 to June 2027. That is eight months of steady work, which gives both teams time to get things running smoothly.

Overall satisfaction was 4.5 out of 5, and the firm said it was happy to be quoted.

There is more to come. The firm has clients who want payroll help. It wants to fix the bookkeeping flow first, and then look at adding more services.

In the firm's own words

★★★★½

"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."

~ Partner, bookkeeping firm in the USA ~

Test us the same way.

Send us a small batch of client books. We'll clean them up, run a senior review and tell you exactly what's missing, before you commit to more.

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