



Course Syllabus

Title: Using Lean Principles to Improve CPA Firm Performance

This webinar will introduce participants to how CPA firms are using the world-class process improvement tools of Lean and Six Sigma to improve their processes and profitability– and ultimately add more value to client relationships – by removing waste and inefficiencies in their processes. Through an introduction to Lean concepts and tools, along with case study examples from Audit, Tax and Client Accounting Service processes, participants will understand that the key to effective processes is not just based on technology. Rather, it involves a unique understanding of value and a methodology that takes a global approach to defining value in firm processes. Get back to the basics – your process – and get results. In today’s economy, you must be able to do more with the resources you have.

If you can answer yes to some of these questions, lean process improvement strategies are applicable to your firm and your process teams:

- Do you have a bunch of work in process but nothing seems to be getting done and ultimately doesn’t get fully billed?
- Are there unnecessary work loops and “churning” in your processes?
- Does client work routinely back up at certain steps in the process?
- Are there inconsistencies in the process between people?
- Do you have partners spending excessive time in the minute details and not enough time on higher-level, value-added services?

Objectives / Takeaways:

Participants will learn:

- 5 steps in the powerful Lean Six Sigma Process Improvement Model.
- 9 Categories of “Waste” in processes and how to eliminate.
- 3 Lean Improvement Strategies universally applicable to process performance.
- Ways to gain time – who couldn’t use more time?
- Ways to create higher realization – and drop more dollars to the bottom line!
- How to create a “project manager” mentality and build quality into lower levels of the firm.
- Why it’s easier to retain top talent with better processes. Who wants to work in ineffective processes/firms?