OHIO STATE ATI

Become your firm’s in-house efficiency guru with

CPA Green Belt Certification

June 20-23, 2017
Tuesday – Thursday, 8 a.m. – 5 p.m.
Friday, 8 a.m. – 12 noon
Wooster, Ohio

ati.osu.edu/greenbelt

Presented by
Ohio State University’s Business Training & Educational Services and
Boomer Consulting Inc.
Why THIS Green Belt Certification Course?

**CPA-focused**... Lots of Green Belt training is available online and across the country, but the OSU/Boomer Consulting Inc. CPA Green Belt Certification program is targeted directly to CPAs. Because it’s designed for you and your firm, the learning curve is shorter – helping you make improvements in your firm much quicker.

**Follow-up coaching**... After the training is over, you will receive remote coaching with your own process improvement project by Dustin Hostetler, Lean Six Sigma Master Black Belt. This gets you to the true application and immediate benefit of your CPA Green Belt Certification!

**Electronic files provided**... That’s right, BRING YOUR LAPTOP! All of the course materials will be emailed to you prior to arriving for the course. These will be yours to use during the four-day program, yours to work with based on your project(s), yours to take with you.

**You’ll also become a member** of the Class of 2017 OSU/Boomer Consulting Inc. CPA Green Belt Certification User Group. We’ll hold periodic calls during your projects to help promote sharing, brainstorming and networking. The User Group calls will focus on the key Lean concept of continuous improvement after project completion.

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**About the Instructor**

**Dustin Hostetler**

Dustin, a Shareholder and Consultant at Boomer Consulting, Inc., is a Lean Six Sigma Master Black Belt. He is the pioneer in applying Lean process improvement concepts within public accounting firms. Over the past several years, Dustin has worked with over 100 top CPA firms and has overseen more than two hundred projects to improve processes in the areas of individual and corporate tax, auditing, payroll, pension administration and bookkeeping. Dustin is revolutionizing the way CPA’s view processes and creating better experiences and results for clients.

“Will get you thinking about your flows & processes and their impact on your ‘product,’ staff and costs of doing business.”
As a certified CPA Green Belt, you will become your firm’s in-house efficiency guru, the one who understands Lean concepts and process improvements. You will be the “flowtivity” expert, taking your firm beyond what is generally considered productivity improvements in CPA firms. Learn how to use the powerful concepts of Lean, combined with project management and workflow management techniques, to improve the efficiency and bottom line performance of your firm.

You’ll be able to facilitate additional Lean projects in your firm and you’ll soon begin to see that efficiency goes way beyond new technology. To truly impact the bottom line in your firm and deliver greater client satisfaction, you need to improve your processes.

Who should attend
This course is designed for rising leaders within CPA firms, which includes manager and partner level CPAs, but consultants and members of your manufacturing segment team will also find it valuable. This course is for you if you want to learn how to apply the powerful Lean Six Sigma methodology to your firm, and potentially your clients.

## Schedule

**Tuesday, June 20**
(8am – 5pm)
- Introductions, purpose & expectations
- Lean & Six Sigma history & overview
- Combining Lean & Six Sigma
- Linking projects to firm strategy
- Introduction to DMAIC
- Lean Simulation
- Project charter
- Team dynamics

**Wednesday, June 21**
(8am – 5pm)
- Process & value stream mapping
- Prioritization matrix
- Identifying clients, needs & requirements
- Kano Model of Client Satisfaction
- FMEA
- Nine categories of waste
- Identifying & busting bottlenecks

**Thursday, June 22**
(8am – 5pm)
- Other Lean tools
- Data analysis & standard deviation
- Kappa Study & other statistical tools
- Manage the front door
- 5S & visual management
- One-piece flow, WIP reduction & work teams
- Gatekeeper/project management techniques
- Procedures & best practices
- Roll-out & presentation strategies

**Friday, June 23**
(8 am – 12 noon)
- Metrics & results to track & measure
- Continuous improvement
- Culture & paradigm shifts
- Facilitation strategies & leadership

**What you’ll learn**

In addition to a toolbox of Lean and Six Sigma tools that will help you with your problem-solving and process improvement projects, you’ll learn the following key items from this course:

- Breakthrough process improvement strategies for your firm, including Lean, project management and workflow management strategies that are proven to improve performance.
- Effective communication strategies and applications of these concepts to your clients – training and developing you to become a better, more-trusted advisor.
- How to effectively facilitate a team and gain much needed buy-in and accountability to changes within your firm.
- How to identify what clients value and improving your processes to match them.
- How to identify and eliminate bottlenecks in processes

Space is limited!
Register today at ati.osu.edu/greenbelt.
Conference Details

Location
The Arden Shisler Center for Education & Economic Development
The Ohio State University
1680 Madison Ave.
Wooster, OH 44691
www.shislercenter.ohio-state.edu

The Ohio State University is tobacco-free. Tobacco use is not permitted on any OSU property.

CPE
32 hours of credit can be earned through this class

Cost
$3,500 - Includes breakfast, lunch and refreshments each day (breakfast and refreshments only on Friday). Two evening dinners / group activities during the week are also included. As part of the certification program, each participant will receive 4 sessions of remote coaching by Dustin Hostetler through the completion of their first process improvement project. Early Bird registration discount (deadline April 25) of $500. See form for details!

Registration
The registration deadline is May 19, 2017. Register online at http://ati.osu.edu/greenbelt or call/email Jan Elliott at 330.287.7511 / Elliott.3@osu.edu. The class is limited to 20 participants. Reservations will be filled first-come, first-served!

Cancellations/Refunds
A 100% refund less a $50 processing fee will be available only if we are notified in writing before May 19, 2017. No refund after this date; you may substitute another person at any time.

Lodging
Hilton Garden Inn
959 Dover Road
Wooster, Ohio 44691
go.osu.edu/greenbelt_lodging

“OSU Green Belt” rate:
$103 + tax per night

Call 330-202-7701

Travel & Parking
Wooster is easily accessed by highway and by air via two northeast Ohio airports. The Akron/Canton airport is approximately 35-45 minutes from Wooster, http://www.akroncantonairport.com/. The Cleveland airport is approximately 60 minutes from Wooster, http://www.clevelandairport.com/.

Parking at both the Hilton Garden Inn and on campus at the Shisler Conference Center is plentiful and complimentary.

Attire
Attire for the CPA Green Belt Certification program is business casual.

Questions?
Contact Dustin Hostetler at 614-288-6426 or Dustin.Hostetler@boomer.com; or Kim Sayers at 330-287-0100 or sayers.1@osu.edu.

“I expect the applications from this course to pay dividends for the next decade in our firm.”
Billy Robinson
Partner
Brown, Edwards and Company

“This class is a must-have for any up and coming leader in any industry. I will be sending a few of my staff to this class. And I loved the facility and location!”
Darrell Williams, Lean Six Sigma
CPA Green Belt
Director of Information Technology
Katz, Sapper & Miller
Indianapolis, IN