Transform into the Firm of Tomorrow with...

Green Belt Certification for CPA Firm Leaders

Why should you attend this course designed for CPA firms?

Change is all around us. Whether it’s from technology innovations, changing client demands, new regulations or a myriad of other factors, there’s no denying the fact the organizations that will continue to thrive are going to be the ones that manage change the best. This course is uniquely positioned to give current and rising leaders within CPA firms the toolsets and skillsets to lead this change – both inside their firms and externally with clients, if desired. Status quo is significantly falling behind in today’s world. Don’t be left behind – learn the skills and make the impact to propel your firm forward.

The Ohio State University Wooster Campus
Shisler Conference Center
July 14-17, 2020
About the Instructor

**Dustin Hostetler**

Dustin is the Co-Founder and Visionary at Transformity Solutions LLC and is a Lean Six Sigma Master Black Belt. He is the pioneer in applying Lean Six Sigma process improvement techniques and strategies to public accounting firms. Dustin has facilitated more than 200 process improvement initiatives and projects across a variety of industries, including: public accounting, manufacturing, non-profits, professional services, food service, retail and technology. He has trained 300+ Green Belts and conducted workshops and speaking engagements for over 10,000 individuals throughout his career.

He brings energy and passion to every project, training and interaction with clients. Dustin is well-known for his unique ability to make things simple and practical to understand and implement; always focusing on action and results.

**Why THIS Green Belt Certification Course**

**CPA Firm Focused.** There are many Green Belt courses available online and across the country, but this program is targeted directly toward current and rising leaders within CPA firms. Whether your specialty is Audit or Tax, Firm Administration or IT, this course is designed to help you drive real and lasting change within the organization. Because it’s designed for you and your role, you can put the tools to immediate use – helping you make improvements much quicker. Want to become more of an advisor / consultant to your clients as well? The tools and skillsets you learn through this class can be packaged into a consulting offering to your clients.

**Expert Facilitation.** Your lead facilitator, Dustin Hostetler, Lean Six Sigma Master Black Belt, is the pioneer in applying Lean Six Sigma principles to CPA firms and service/transactional processes. He has over 15 years of experience leading change within the CPA profession and brings that experience to life through fun and engaging client examples, case studies, and interactive discussions. The facilitator you choose to be trained under matters. It’s the difference between just taking a course and making an impact. Dustin is personally committed to seeing all his students thrive.

**Follow-up Coaching.** After the class is complete, you will receive remote coaching by Dustin with your very own process improvement project. This gets you to the true application and immediate benefit of your Green Belt Certification!

**Electronic Files Provided.** All participants will receive the electronic class materials in advance, so bring your laptop! The files will be yours to use, not only during the 4-day class, but also going forward to take with you on your journey!

**REGISTER NOW!**

[go.osu.edu/greenbelt2020](http://go.osu.edu/greenbelt2020)

Registration deadline: June 26, 2020
Who Should Attend
This course is designed for professionals and leaders within the CPA profession – CPAs, firm administrators and COOs, IT professionals and CIOs, HR professionals and rising firm leaders. There will be a diverse mix of experiences and backgrounds in each class – allowing you to broaden your learning horizons by hearing and learning examples outside of your current specialty area(s).

If you work in the CPA profession and see opportunity in your organization, or with clients, to be more innovative in processes and strategy, you need to be here.

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 initiatives you will learn the following key takeaways from this course:

- Breakthrough process improvement strategies for your business, including lean, project management and workflow management strategies that are proven to increase performance and velocity.

- Effective communication strategies and application of these concepts to your customers – training and developing you to become a better, more trusted business professional and advisor both internally and externally.

- How to effectively facilitate a team and gain much needed buy-in and accountability to changes within your organization.

- Understanding how to identify true value from a customer point of view and improving your processes and strategies to deliver to that level.

- Identification and elimination of bottlenecks and waste from your processes.

- How to maximize buy-in to process improvement and lead change management initiatives internally within your organization and externally to clients.

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Conference details

Location
The Arden Shisler Center for Education & Economic Development
The Ohio State University
1680 Madison Ave.
Wooster, OH 44691
woostervenues.osu.edu

CPE Credits
30 hours of CPE Credit can be earned through the class

Cost
$3,000 – Includes breakfast, lunch and refreshments each day (breakfast and refreshments only on the last day). As part of the certification program, each participant will receive remote coaching from Dustin Hostetler through the completion of your first project.

Registration
Registration Deadline is June 26, 2020, open to the first 20 participants
To register, please visit: go.osu.edu/greenbelt2020

Cancellations/Refunds
A 100% refund less a $50 processing fee will be available if we are notified in writing up to 15 days prior to the first day of the course. No refund is available after this date. You may substitute another person at any time.

Lodging
Hilton Garden Inn - located across the street from the Shisler Conference Center
959 Dover Road
Wooster, OH 44691
(330) 202-7701
OSU Room Rate: $111.00 plus tax (mention “GRE” when you reserve a room)
To reserve a room online: go.osu.edu/cpahotel
Please note: room rates are valid through 6/22/2020

Travel

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

Questions?
Contact Dustin Hostetler at 614-288-6426 or dustin@transformityinc.com; or Zac Burkey at 330-287-7511 or burkey.56@osu.edu.

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Day 1
(8am – 5pm)
• Introductions, purpose & expectations
• Lean & Six Sigma intro and overview
• Linking change management to business strategy
• Introduction to the DMAIC methodology
• Interactive Lean simulation
• Creating a project charter
• Mastering team dynamics

Day 2
(8am – 5pm)
• Understanding current state - Process & value stream mapping
• Identifying customers, needs & requirements
• Kano Model of customer satisfaction
• FMEA to analyze processes
• Nine categories of waste
• Identifying & busting bottlenecks

Day 3
(8am – 5pm)
• CPA Firm of Tomorrow – The what, why and how
• Managing the front door
• 5S & visual management
• One-piece flow, WIP reduction & work teams
• Gatekeeper/project management techniques
• Documenting new processes

Day 4
(8am - 12noon)
• Rollout and presentation strategies to maximize buy-in
• New metrics & results to track and measure
• Continuous improvement
• Culture & paradigm shifts
• Facilitation strategies & leadership

THE OHIO STATE UNIVERSITY
COLLEGE OF FOOD, AGRICULTURAL, AND ENVIRONMENTAL SCIENCES

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1625 Wilson Road, Wooster, OH 44691
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REGISTER Today!
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