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.

LIVE ONLINE via ZOOM
August 10, 17, 24 and 31, 2021
Time of day will be determined based on locations/time zones of class participants. Class will start no earlier than 7AM and no later than 10AM for anyone!
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. 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!

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**About the Instructors**

**Dustin Hostetler**

Dustin is the industry pioneer in applying Lean Six Sigma process improvement techniques to the CPA profession. Over the past 14+ years of consulting to the profession, he has worked with over 150 firms to enhance processes and optimize technology utilization, including working with over half of the top 100 firms in the country. In recent years, Dustin has become well-known in the profession in helping firms develop and execute upon creating compelling visions and transformation plans.

**Michael Wherry, CPA**

Michael brings over 16+ years of real-world, inside firm experience to every consulting and mentorship opportunity he is presented with in the profession. As a practitioner inside firms, he led various technology automation and process improvement initiatives over the years. As he made the transition from ‘Technical CPA’ to ‘Consultant CPA’ 5 years ago, he utilizes his unique skill sets and “been there, done that” know-how to optimize buy-in and inspire confidence for his clients.
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.

Course details

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

Cost
$3000 –Includes live, real-time discussion all four days with instructor and class participants, all class materials in electronic format for your use during the class and as your templates for moving forward. 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 July 20, 2021, open to the first 10 participants
To register, please visit: go.osu.edu/greenbelt2021
Online Green Belt Certification Outline

Each day will have interactive demonstrations / simulations, practice exercises and case study examples built into the material.

Day 1: The Foundation
- Introductions, Purpose, Expectation Setting
- History and Overview of Lean and Six Sigma
- Introduction to the DMAIC Process Methodology
- The Culture of Lean Six Sigma
- Linking to Organizational Strategy (The ‘Why’)

Day 2: The Tools
- Facilitating Team Dynamics
- Project Charter
- Process and Value Stream Mapping
- Customer Value Assessment and Kano Model
- FMEA and Analysis Tools
- 9 Categories of Waste

Day 3: The Innovative Solutions
- Managing the Front Door
- Identifying and Improving Bottlenecks
- Demand Planning / Takt Time
- Level-Loading Processes
- 5S and Visual Management
- WIP Reduction
- Building Consistency and Standardization
- Project and Engagement Management Strategies

Day 4: Leading the Change
- Rollout and Implementation Strategy
- Process Documentation
- Training Best Practices
- Future-Focused Metrics and Measurement
- Value-Add Mindsets
- Accountability Planning
- Continuous Improvement Strategy

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10AM-6PM Eastern
9AM-5PM Central
8AM-4PM Mountain
7AM-3PM Pacific

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Questions? Contact Zac Burkey (burkey.56@osu.edu)

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.