



SAVE THE DATE!

“An Introduction to Lean and Six Sigma in CPA Firm Administration”

Presented by Michael Wherry, Transformity Solutions LLC

Wednesday, November 6, 2019

7:30am – 12:00pm

Location:

MacArthur Court Conference Center
4685 MacArthur Court, 3rd Floor, Newport Beach, CA 92660

Cost:

\$30 Members • \$40 Non-Members

Registration now open at www.cpaafma.org/socal/events

Presentation Summary:

The most successful firms of all sizes leverage Lean Six Sigma to improve both internal and external processes. The first half of this presentation will introduce the core concepts of both Lean and Six Sigma through an interactive demonstration. Those in attendance are sure to have fun and learn how simple changes can yield significant results. With a solid foundation of the concepts, the second half of the session will have attendees break into small groups to brainstorm how the lessons learned can be applied back at your firm. Before the morning is finished, each attendee will have at least one key change idea they will take back to their firms.

Objectives:

- Learning what is Lean and Six Sigma and how it can be applied to CPA firm administration.
- Understanding how to identify the true value from a customer point of view and improving your processes and strategies to deliver on that level.
- How to identify process waste and bottlenecks so you can eliminate both from your processes.

Outline:

- Lean Simulation
 - Learn three “must have” lean process improvement strategies through this interactive event.

- Introduction to Lean and Six Sigma Concepts
 - 9-categories of waste in CPA firms and how to eliminate.
 - 5-Step Process Improvement Model.
 - Identifying and improving process bottlenecks.
- Kano Model for Customer Satisfaction
 - Learn additional ways to add value for clients.
- Roundtable discussion
 - How does Lean Six Sigma apply to firm administration?
 - What strategy or key take away am I taking back to my firm?

Schedule:

7:30 - 8:00am	Breakfast and networking
8:00 - 8:15am	Welcome from our chapter President
8:15 - 10:00am	Presentation
10:00 - 10:15am	15-minute break
10:15 - 10:55am	Lean Six Sigma concepts
10:55 - 11:10am	Kano model
11:10 - 12:00pm	Roundtable discussion

Who Should Attend:

Firm Administrators, Partners and Managers are welcome to join our interactive and lively discussion. A catered breakfast is included, and the morning provides an excellent opportunity to network with other local firm administrators and accounting industry professionals.

About Michael Wherry, CPA, Entrepreneur, Lean Six Sigma Black Belt, Co-Founder Transformity Solutions LLC



As Co-founder and Chief Execution Officer for Transformity Solutions LLC, Michael leverages his past CPA firm experience to leverage his tenacity for challenging the status quo so together he and his clients can maximize today and do better tomorrow.

Michael excels at synthesizing large amounts of data while identifying the most crucial information. Being careful to follow the best process, he blends different approaches to solve problems to accomplish goals. Never one to change for the sake of change, Michael carefully considers when to experiment and when to stick with a proven method.

Michael is passionate about helping others which shows up in his ability to think deeply about complex topics and then translate solution options in a clear way for others to understand. He also is very

organized and able to make a plan of action and then follow through. Michael also enjoys learning new things and finding ways to incorporate these new ideas into his work.

Prior to co-founding Transformity Solutions LLC, Michael was a consultant with Boomer Consulting, Inc. and held many roles at various Minneapolis area CPA firms, including CBIZ MHM. He has over 20 years of public and industry accounting experience. During his time in “the trenches” he worked on many process improvement and technology utilization projects.

Michael holds a bachelor’s degree in Accounting from the University of Northern Iowa in Cedar Falls, Iowa and an active CPA license with the State of Minnesota. Michael spends the fall as a member of the Maple Grove High School Football Livestream crew providing commentary. He and his wife, Tina, live in Maple Grove, MN with their son, Spencer, daughter, Morgan and their two dogs, Bunker and Nash.

To learn more about CPAFMA and the SoCal Chapter, visit www.cpaafma.org/socal

We look forward to seeing you in November!