



## **\*\* SPEAKER CHANGE \*\***

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

**Presented by Amanda Wilke, Boomer Consulting, Inc.**

**Wednesday, November 6, 2019  
7:30am – 12:00pm**

**Location:**

MacArthur Court Conference Center  
4685 MacArthur Court, 3<sup>rd</sup> Floor, Newport Beach, CA 92660

**Cost:**

\$30 Members • \$40 Non-Members  
*\*Attendees can earn 4 hours of CPE credit*

**Registration now open at [www.cpa-fma.org/socal/events](http://www.cpa-fma.org/socal/events)**

#### **Learning Objectives:**

- Understand fundamental Lean Six Sigma concepts and how they can be applied to firm administration.
- Identify non-value add steps in your processes to focus on adding value from your clients' perspective.
- Learn strategies to eliminate waste and bottlenecks from your processes.

#### **Outline:**

- Lean Simulation
  - Participate in this interactive session to learn the imperative Lean process improvement strategies.
- Introduction to Lean and Six Sigma Concepts
  - 9 categories of waste in CPA firms and how to eliminate.

- 5-step process improvement framework.
- Identifying and improving process bottlenecks.
- Change Management
  - Strategies to gain buy-in and support for process improvement.
- 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	<b>Breakfast and networking</b>
8:00 - 8:15am	<b>Welcome from our Chapter President</b>
8:15 – 9:55am	<b>Lean Simulation</b> <ul style="list-style-type: none"> <li>● Participate in this interactive session to learn the imperative Lean process improvement strategies.</li> </ul>
9:55 - 10:15am	<b>Break</b>
10:15 - 10:40am	<b>Introduction to Lean and Six Sigma Concepts</b> <ul style="list-style-type: none"> <li>● 9 categories of waste in CPA firms and how to eliminate.</li> <li>● 5-step process improvement framework.</li> <li>● Identifying and improving process bottlenecks.</li> </ul>
10:40 - 11:05am	<b>Change Management</b> <ul style="list-style-type: none"> <li>● Strategies to gain buy-in and support for process improvement</li> </ul>
11:05 - 12:00pm	<b>Roundtable discussion</b> <ul style="list-style-type: none"> <li>● How does Lean Six Sigma apply to firm administration?</li> <li>● What strategy or key take away am I taking back to my firm?</li> </ul>

#### **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.

To learn more about CPAFMA and the SoCal Chapter, visit [www.cpaafma.org/socal](http://www.cpaafma.org/socal)

**We look forward to seeing you next month!**

## About Amanda Wilkie:



A Consultant at Boomer Consulting, Inc., Amanda has a computer science background, but she's not your average geek. With two decades of technology experience, Amanda has spent 14 years driving change and process improvement through innovative technology solutions working across firms of varying sizes in the public accounting profession. She has held strategic leadership positions in firms ranging from Top 50 to Top 10 including her most recent role as CIO of a Top 30 firm.

Amanda is a recognized expert in the profession who regularly speaks and writes on blockchain and cryptocurrency and their impact on the profession.

### Awards and Recognitions

Selected to speak at AICPA Engage conference 2015 –2019

Certified Project Management Professional (PMP)

Microsoft Certified Solution Associate (MCSA)

### Kolbe

Amanda's Kolbe A™ Index reveals her to be excellent in situations that require strategic organization of information. She is adept at setting priorities and putting them into appropriate sequences. Her talent with both strategics and tactics make her essential to any massive effort.

### Personal

Amanda holds a bachelor's degree in Computer Science from High Point University in High Point, North Carolina and an MBA from Shorter University in Rome, Georgia. She volunteers her time and experience to an organization that works with disadvantaged young adults who just need a hand and a champion to become professionals. When she takes a break from her professional endeavors, you can find her running trails in her hometown of Alexandria, Virginia or planning her next vacation with friends.