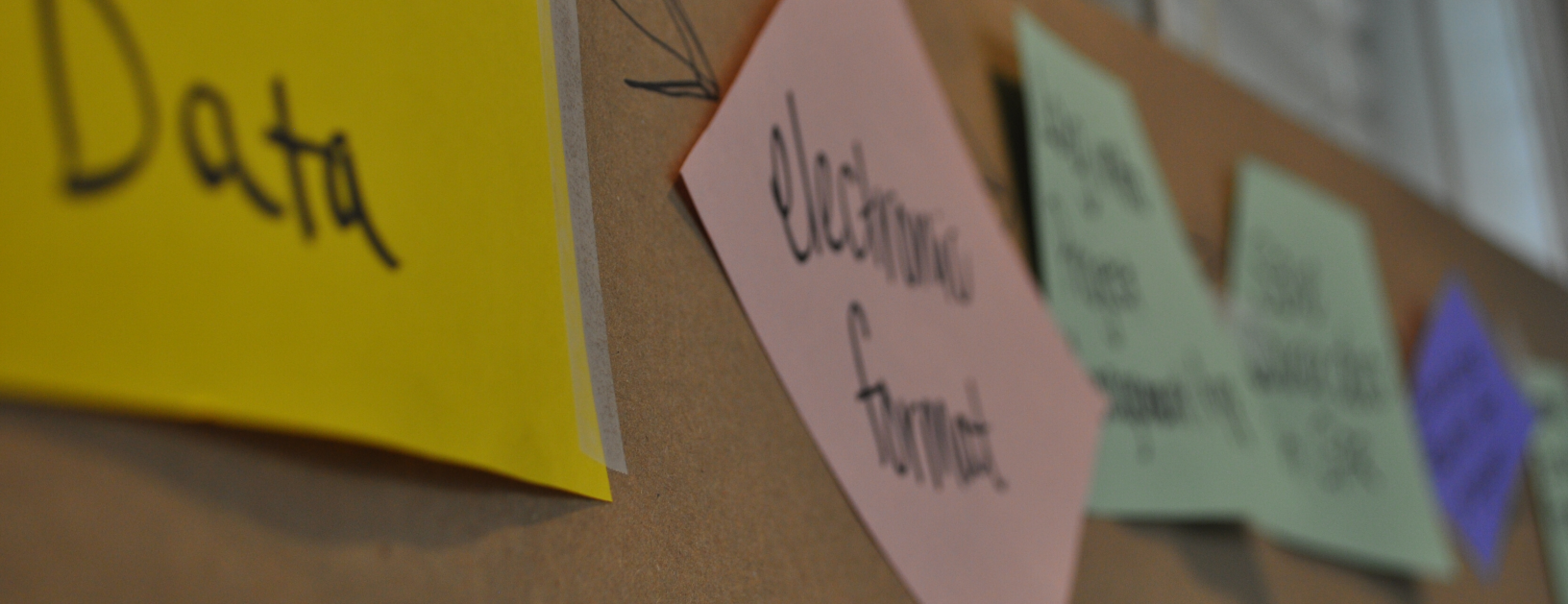


GETTING LEAN: AVIZO GROUP'S STORY

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Our Results

For several years, Avizo Group, Inc. (formerly Hartmann, Blackmon & Kilgore, P.C.) has been employing the use of Lean Six Sigma to improve processes and efficiency in our firm. Our dedication to continuous improvement has led to successes beyond industry expectation. Coupled with other internal initiatives, Lean has helped our company decrease busy season overtime by 40%, increased employee morale, and improved client satisfaction.

Continuous improvement with internal initiatives including Lean Six Sigma, Strategic Planning, 5 Star Service, and Project 40™ have made a tremendous difference in where we find ourselves today compared to even a couple of years ago. We have taken great strides to find better ways to complete our workload and every “busy” season our reports validate that we've been continually successful in reaching our goals. Because of these initiatives, production is up, labor time is down, and we have maintained the high quality we are famous for.

If decreasing the time spent on projects while increasing the quality sounds appealing to you, but you don't know how or where to begin, just take a few moments to read our story. When we started with these initiatives, we weren't looking for “a better way”, but we found it, and the impact has been remarkable.

Finding Lean

At the end of 2009, Avizo Group was on the cusp of our first major shareholder changes, with retirement pending for three of the six shareholders, one being the managing shareholder. Anticipating the transition, we decided to attend the “Winning is Everything” conference in January 2010 with the hope of finding someone to consult and help with the transition.



To get a clear picture of our firm at the time, here is a quote from an intern at the time: “There are six shareholders and six different ways of doing things.” Our processes catered to the personal preference of each shareholder, which made every task different. We were also changing from using paper files to preparing returns electronically. Some within the firm were ready to make the change while others were not, so the “paperless process” was more like “paperless preference”.

We had expectations of growth, but no solid plan to guide us through it.

Prior to leaving for the conference, one of our soon-to-retire shareholders handed me his January 2010 issue of Journal of Accountancy and suggested I read an article titled, “Get Results: Improve Your Accounting Firm Processes Using Lean Six Sigma” by Dustin Hostetler. I read my first introduction to Lean on the plane to the conference, where we would meet Dustin and engage his help in our first step to becoming a more efficient and successful firm.

Developing the Avizo Way

For our first Lean project, Dustin came to our office in Fairhope, Alabama and we developed a single system for completing individual tax returns. From six varying processes to one, we developed “the Avizo way” of doing a return and implemented it immediately. Through skepticism and initial resistance from both preparers and reviewers, we continually insisted everyone follow the same process.

Once we had it down, the results were obvious: we were getting returns done faster, with fewer review notes, which meant the client received their complete and accurate return sooner.

To keep the momentum going, we completed two more Lean programs for our business tax entities and our client accounting service processes. As a firsthand witness to the huge impact and success Lean brought to our company, I developed a passion for Lean. I became certified as a Green Belt consultant and currently lead Lean projects within Avizo and for other firms nationwide.

Continuous Improvement

With a Lean project, you must strive for “Continuous Improvement” which means you should always look for ways to make your process even better. Every year, we reexamine processes to make improvements. Because of changes in technology and regulations, we cannot become complacent with doing things the way we always have.

Lean has allowed us to greatly improve turn-around time because we send work through a process that focuses on efficiency and eliminating errors, which results in greater client satisfaction. In addition, our employees benefit from having one process to follow – and if they follow it, the work moves forward to the next step instead of backwards, so there is less time spent on each step. As a result, our firm benefits because the clients and employees are happier.

If my description of our firm in 2009 sounds familiar to you, or if you’ve heard the phrase “we’ve always done it that way”, you should consider Lean to help you get the momentum to move forward. Remember those six shareholders, who each had their own way of doing things? I was one of them. We knew having individual preferences made our processes and the paperless effort harder, but at the time we did not realize just how much it was holding us back. Lean showed us how to find the inefficiencies and eliminate them, and it has been helping us improve ever since.

We know these initiatives can make a difference in any business. If you would like to get more done, in less time, with better quality, it may be time to consider Lean.