

A 250-person CPA firm cuts correction time by 80%: Sales and customer service

PROFESSIONAL SERVICES

MEDIUM

SALES AND CUSTOMER SERVICE

>50%

WRITE-OFF REDUCTION [1]

-80%

CORRECTION TIME [1]

11

OFFICES [1]

PROBLEM

Defects, write-offs, review loops, and bottlenecks consumed scarce seasonal capacity. Rework reduced the time that experienced staff could spend on client service and high-value review.

SOLUTION

The firm standardized routine work, measured defect categories, managed bottlenecks, and redeployed resources. Leaders used the defect data to focus improvement on the errors and constraints with the largest capacity effect.

RESULT

Tax-process write-offs fell by more than 50% in one year. Correction time for major defect categories fell by 80%.

BUSINESS LENS

SWOT: professional expertise was strong, but seasonal rework reduced capacity. Defect data targeted the constraint.

ASSUMPTIONS AND LIMITS

Self-reported practitioner case with no control group or full cost calculation.

"If you do what you've always done, you'll get the same results. Make a change. Get results."

Dustin Hostetler

DEPARTMENT APPLICATION

SALES AND CUSTOMER SERVICE

Fewer corrections protect client trust.

Application analysis based on the cited source. It is not a separate measured result.

Prepared by Ocmulgee Business Process Solutions from the cited independent source. This is not an Ocmulgee client engagement or an original Ocmulgee result.

SOURCE [1]

Hostetler, 2010. Get Results: Improve Your Accounting Firm Processes Using Lean Six Sigma. <https://www.journalofaccountancy.com/issues/2010/jan/20091484/>

Independently edited AICPA practitioner case | Size basis: Two hundred fifty employees across 11 offices; medium under the site's 50-499 working band.