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FIRM MANAGEMENT

Why Lean?

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Dustin Hostetler • Feb. 17, 2017



Don't Miss Your Life. You never know where inspiration will strike. I was on an early morning drive to the airport several years ago, driving a cold and dark state route as I made my way to the freeway. In my little part of the world, we tend to listen to more country music than other genres. While I'm not a huge music guy, I opted out of the news that morning and instead tuned into a local country station. A song came on that I had never heard before – 'Don't Miss Your Life,' by Phil Vassar. It was a game changer for me – both personally and in the insight it provided that applied to all of my clients as well.

It started with the lyrics "On a plane to the west coast, laptop on my tray. Papers spread across my seat, a big deadline to make." And slowly it goes through one life event after another that busy business people may miss along the way. It hit me hard.

“The truth is half the time, I’m not even there.” Wow, I thought. Is this a song about me? I travel a lot. I make it a priority to make almost every one of my kids’ sporting events and activities, although as they get older and all three are starting to have more activities, my wife and I have had to divide and conquer more. Still, it struck close to home and made the point that I need to watch my work schedule.

“Hold on tight, because it doesn’t happen twice. Don’t miss your life.”

Full lyrics here: <http://www.azlyrics.com/lyrics/philvassar/dontmissyourlife.html>

Finding the Right Balance. As I thought more about the meaning of those words in that song, not only did it inspire me personally to strive for better balance, but it gave me another talking point with my clients as we’re all striving for better balance in our lives. For the past several years, Lean Six Sigma (Lean) has been helping CPA firms make their processes more effective and efficient. We’ve been saying for many years that at the heart of Lean thinking is a focus on optimizing value from the client’s point of view. Most will understand right away what that means for the external client. Fewer understand that it also means optimizing value for the internal client – all of you and your co-workers inside the firm.

One of the more specific ways Lean adds value to the internal client is in the increased satisfaction and morale of being able to work in processes where you’re working smarter, not harder, to get work done. The more we do this, the more we improve the way we work and our processes, the more time we free up. Time that can be spent both at a higher level of value for our clients (where the fun is!), but just as important is time that we can be more present in our lives outside of work.

Kano Model of Client Satisfaction. In every one of our Lean engagements, we always begin with the “why.” Why Lean? Why is your firm embarking on this process improvement journey? What’s in it for you and your team members? One of the most effective models we introduce, which allows us to quickly answer the “why” and optimize buy-in right out of the gate, is a model of client service called the Kano Model.

As you can see, there are three levels of service that you provide to your client. The basic level of service is viewed as a commodity (like it or not). This is the most basic compliance work that you perform. Clients take this work for granted. It doesn’t matter how much time you spend there, you’re never truly crossing that threshold of true client value and satisfaction.

You'll cross that threshold of playing above the line when you begin operating at the performance- and delighter-levels for your clients.

Performance services are the work you perform and time you spend that generate the primary benefit your client is seeking. It's being proactive in guidance, and timely in responses and deliverables. It's finding ways to make it easier for your client to do business with you. It's advising clients instead of being a historian. This is the first level of differentiation.

Delighter services are where you go above and beyond for clients. It's where you generate the "wow" factor. If you delight the client, it's often an unexpected element of service that you've provided. The most successful global brands for service understand this principle – and train/build it into their cultures.

Why Lean? Well, simply stated, because we need to be as crisp and effective down at the basic level of service, so we don't waste any time there. We need to free up time from wasteful processes to operate at that performance- and delighter-level for our clients. That is where the true value resides – both for clients of your firm as well as for all of you working inside the firm. This is where your firm commands higher fees. This is how you work fewer hours on the compliance work. This is how you create more balance in your work and your life.

I hope this column has helped in the understanding that Lean is not just a process improvement initiative. It's a game-changer mindset. We don't have time to waste in our lives. To find the balance that keeps all of us individually performing at our best, we have to be part of effective processes with our team members. When we're "rowing in the same direction" with our team, we can become more forward looking and thinking for our clients. That elevates what we do and the value we add to our client relationships and our firms. This reinvigorates us AND gives us time to be more present for our friends and loved ones.

This busy season, don't miss your life. Don't miss those key moments with your kids. Don't be the one that always says no to your friends. Find ways to use the principles of Lean to better your processes, better your communication, and better your life – both your work life and your home life. **It's not about the hours you work. It is about the value you create.**

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