



TAX TRANSFORMATION
S U M M I T
NOVEMBER 3-5, 2019

The Continuous Improvement Approach to Leading Change

Arianna Campbell

Director

Boomer Consulting, Inc.

© 2019 Boomer Consulting Inc. All rights reserved.

BOOMER
CONSULTING, INC. 



Arianna Campbell

Resume Highlights:

- Lean Six Sigma Black Belt
- CPA Practice Advisor Top 25 Most Powerful Women in Accounting
- CPA Practice Advisor – 20 under 40 Superstars
- AICPA Accounting Information and Operations Management (AIOM) Task Force Member
- The CPA Consultants' Alliance Member

My Passion – Helping CPA firms navigate their continuous improvement journeys.



TAX TRANSFORMATION
S U M M I T
NOVEMBER 3-5, 2019

© 2019 Boomer Consulting Inc. All rights reserved.

BOOMER
CONSULTING, INC. 



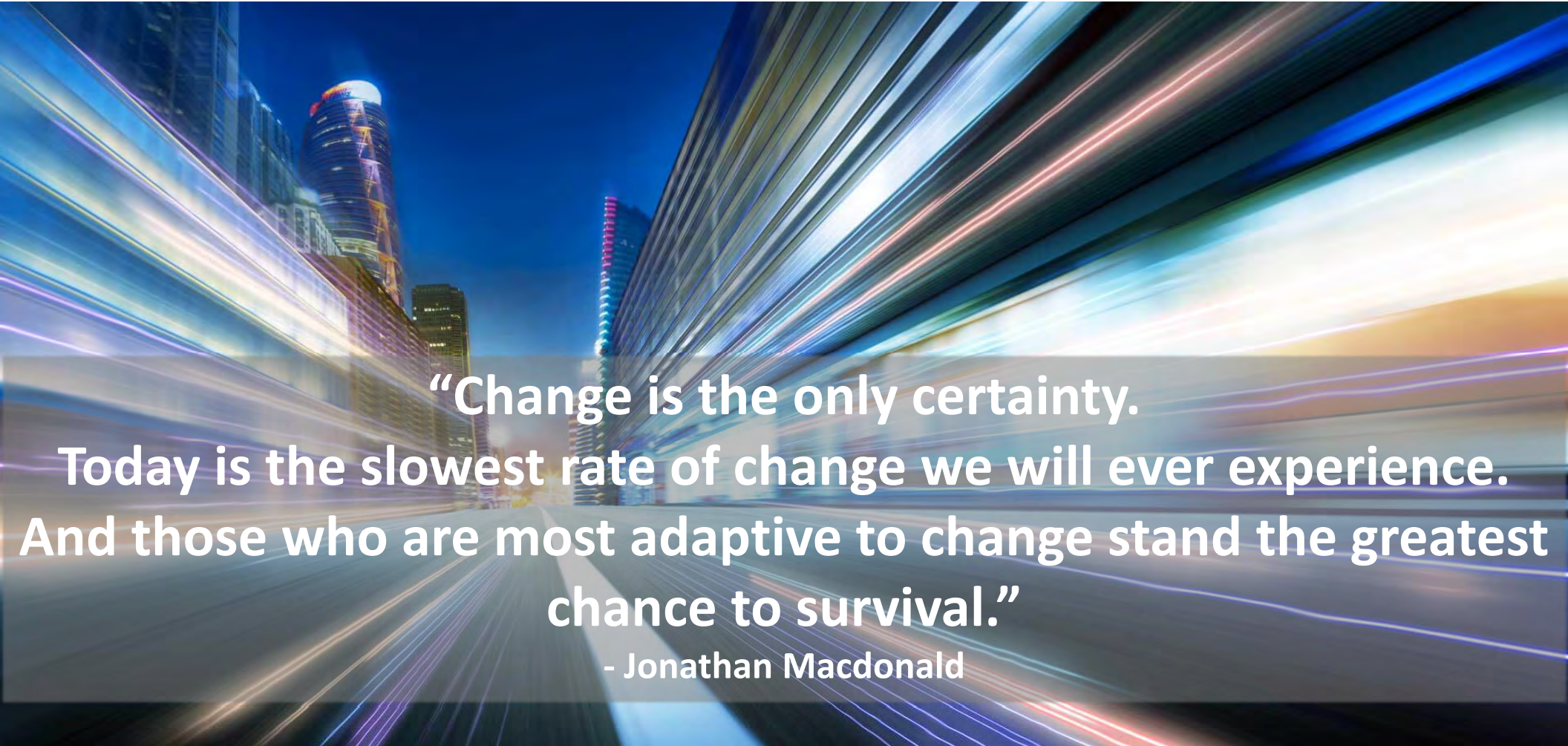
The Opportunities Are Endless



TAX TRANSFORMATION
SUMMIT
NOVEMBER 3-5, 2019

© 2019 Boomer Consulting Inc. All rights reserved.

BOOMER
CONSULTING, INC. 



“Change is the only certainty.

Today is the slowest rate of change we will ever experience.

And those who are most adaptive to change stand the greatest chance to survival.”

- Jonathan Macdonald



**TAX TRANSFORMATION
S U M M I T
NOVEMBER 3 - 5, 2019**

© 2019 Boomer Consulting Inc. All rights reserved.

BOOMER
CONSULTING, INC. 

Continuous Improvement:

“An ongoing effort to improve products, services, or processes.

Put simply, it means ‘getting better all the time’.”

- Wikipedia



TAX TRANSFORMATION
S U M M I T
NOVEMBER 3 - 5, 2019

© 2019 Boomer Consulting Inc. All rights reserved.

BOOMER
CONSULTING, INC. 

The Continuous Improvement Approach to Leading Change:

- Alignment
- Awareness
- Accountability
- Acknowledgement



TAX TRANSFORMATION
S U M M I T
NOVEMBER 3 - 5, 2019

© 2019 Boomer Consulting Inc. All rights reserved.

BOOMER
CONSULTING, INC.

The Continuous Improvement Approach to Leading Change:

- **Alignment**
- Awareness
- Accountability
- Acknowledgement



TAX TRANSFORMATION
S U M M I T
NOVEMBER 3-5, 2019

© 2019 Boomer Consulting Inc. All rights reserved.

BOOMER
CONSULTING, INC.



What is your firm's strategy for change?

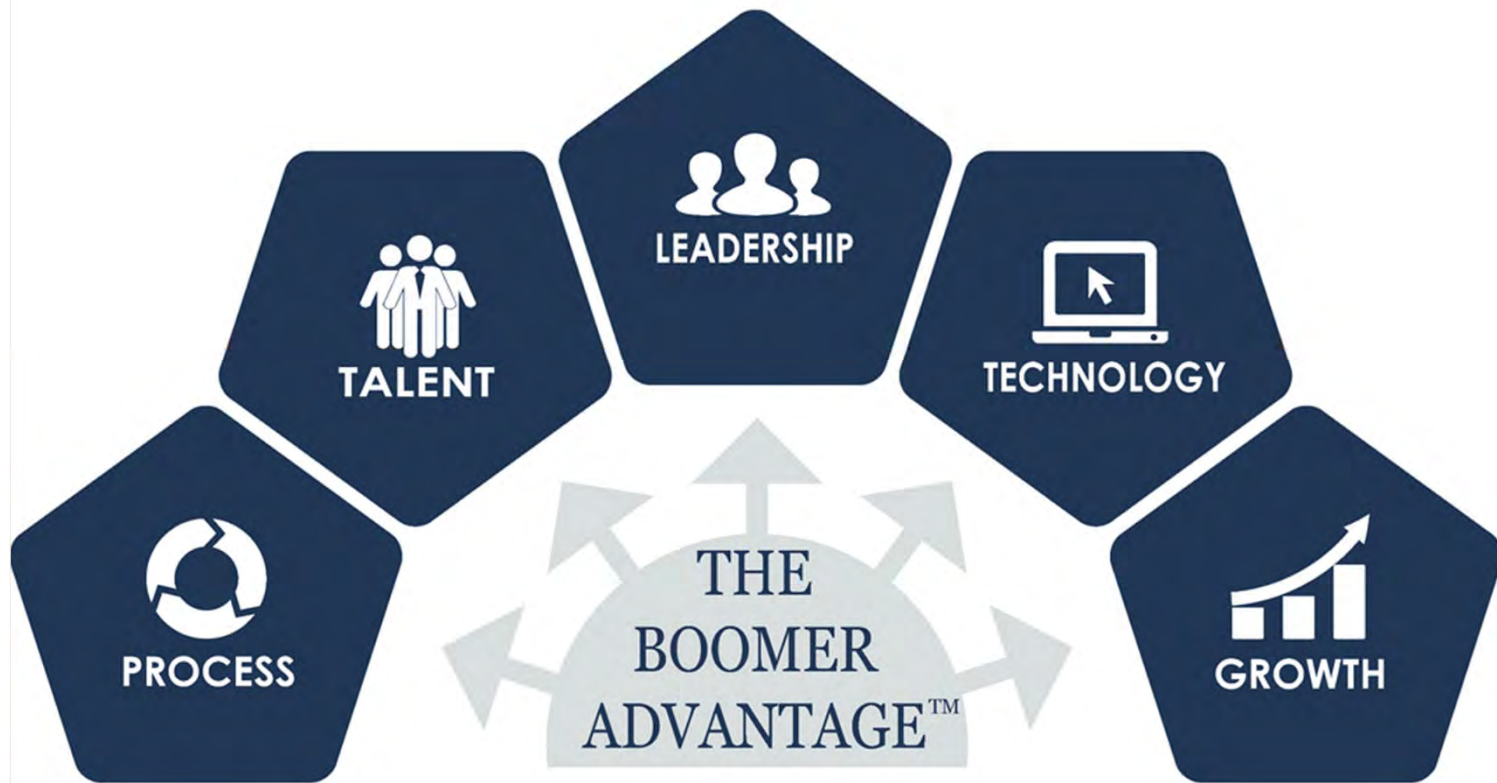


TAX TRANSFORMATION
SUMMIT
NOVEMBER 3-5, 2019

© 2019 Boomer Consulting Inc. All rights reserved.

BOOMER
CONSULTING, INC.

The 5 Areas Critical to Firm Success



TAX TRANSFORMATION
S U M M I T
NOVEMBER 3-5, 2019

© 2019 Boomer Consulting Inc. All rights reserved.

BOOMER
CONSULTING, INC.

Who is leading change in your firm?



TAX TRANSFORMATION
S U M M I T
NOVEMBER 3-5, 2019

© 2019 Boomer Consulting Inc. All rights reserved.

BOOMER
CONSULTING, INC.



Has the Voice of the Client been included?



TAX TRANSFORMATION
S U M M I T
NOVEMBER 3-5, 2019

© 2019 Boomer Consulting Inc. All rights reserved.

BOOMER
CONSULTING, INC.

The Continuous Improvement Approach to Leading Change:

- Alignment
- **Awareness**
- Accountability
- Acknowledgement



TAX TRANSFORMATION
S U M M I T
NOVEMBER 3-5, 2019

© 2019 Boomer Consulting Inc. All rights reserved.

BOOMER
CONSULTING, INC.



How is firm talent being impacted by change?

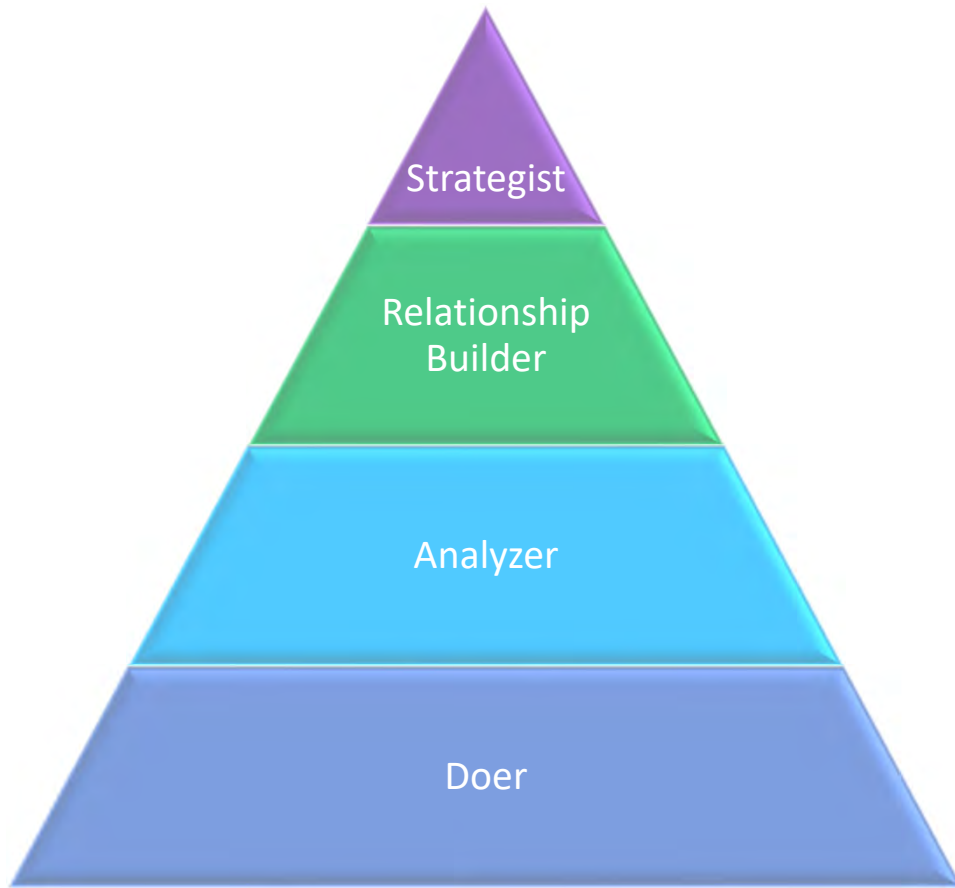


TAX TRANSFORMATION
SUMMIT
NOVEMBER 3-5, 2019

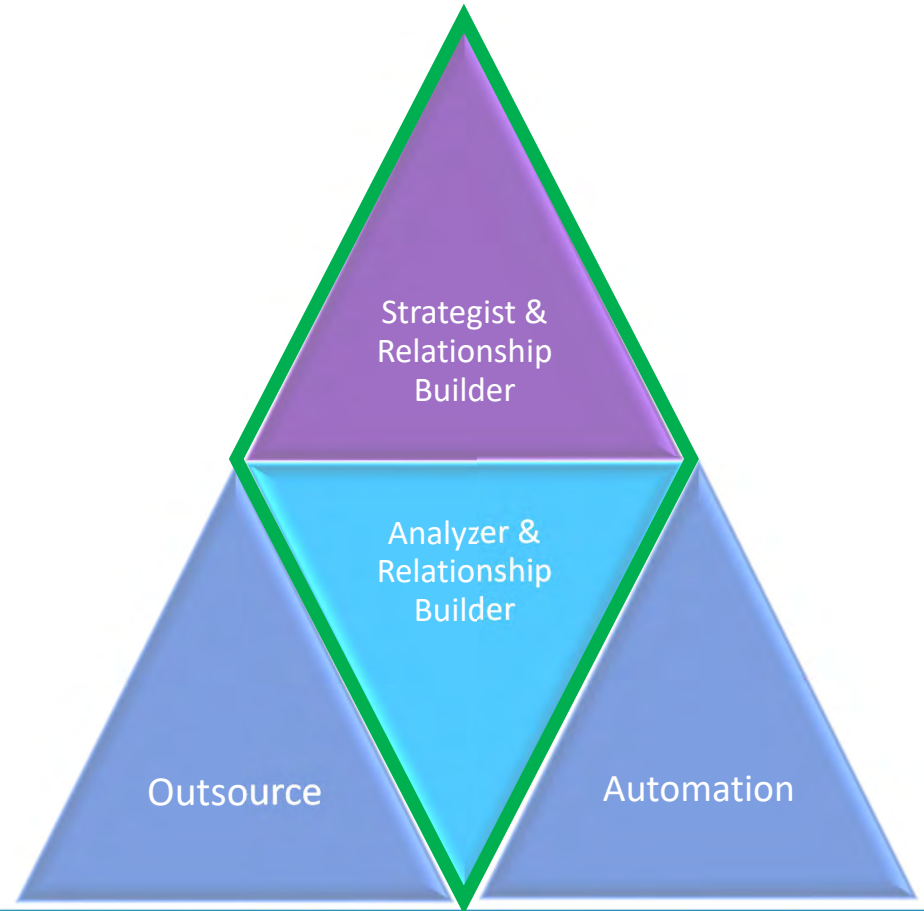
© 2019 Boomer Consulting Inc. All rights reserved.

BOOMER
CONSULTING, INC. 

Firm of Today



Firm of Tomorrow



How is the emotional side of change being addressed?



TAX TRANSFORMATION
S U M M I T
NOVEMBER 3 - 5, 2019

© 2019 Boomer Consulting Inc. All rights reserved.

BOOMER
CONSULTING, INC. 



Is there an expectation of 100% buy-in?



TAX TRANSFORMATION
S U M M I T
NOVEMBER 3-5, 2019

© 2019 Boomer Consulting Inc. All rights reserved.

BOOMER
CONSULTING, INC. 

The Continuous Improvement Approach to Leading Change:

- Alignment
- Awareness
- **Accountability**
- Acknowledgement



TAX TRANSFORMATION
SUMMIT
NOVEMBER 3-5, 2019

© 2019 Boomer Consulting Inc. All rights reserved.

BOOMER
CONSULTING, INC.

How is success being measured and tracked?



TAX TRANSFORMATION
S U M M I T
NOVEMBER 3-5, 2019

© 2019 Boomer Consulting Inc. All rights reserved.

BOOMER
CONSULTING, INC.



Are success metrics visible and transparent?



TAX TRANSFORMATION
S U M M I T
NOVEMBER 3 - 5, 2019

© 2019 Boomer Consulting Inc. All rights reserved.



Are peers and outside resources being leveraged?



TAX TRANSFORMATION
S U M M I T
NOVEMBER 3-5, 2019

© 2019 Boomer Consulting Inc. All rights reserved.

BOOMER
CONSULTING, INC. 

The Continuous Improvement Approach to Leading Change:

- Alignment
- Awareness
- Accountability
- **Acknowledgement**



TAX TRANSFORMATION
S U M M I T
NOVEMBER 3-5, 2019

© 2019 Boomer Consulting Inc. All rights reserved.

BOOMER
CONSULTING, INC.

Is feedback being gathered and shared effectively?



TAX TRANSFORMATION
S U M M I T
NOVEMBER 3 - 5, 2019

© 2019 Boomer Consulting Inc. All rights reserved.

BOOMER
CONSULTING, INC.



Are successes acknowledged and celebrated?



TAX TRANSFORMATION
S U M M I T
NOVEMBER 3-5, 2019

© 2019 Boomer Consulting Inc. All rights reserved.

BOOMER
CONSULTING, INC. 

A silhouette of a person pushing a large, glowing orb up a hill against a sunset sky. The scene is set on a grassy hill with a vibrant sunset in the background, featuring a large, bright sun partially obscured by clouds. The person is leaning forward, pushing the orb up the slope. The overall mood is one of determination and effort.

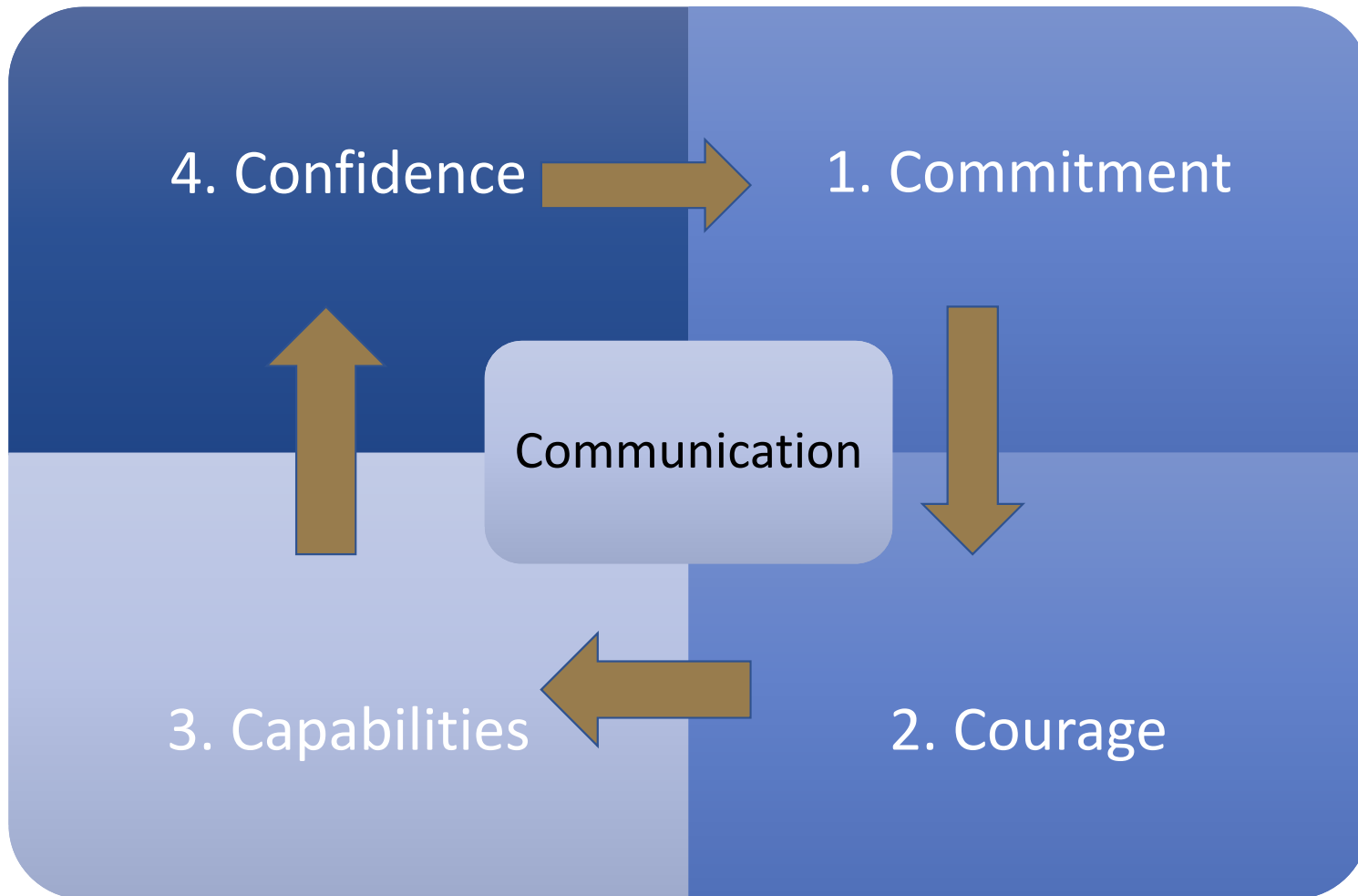
Are you leading with **COURAGE**?



TAX TRANSFORMATION
S U M M I T
NOVEMBER 3 - 5, 2019

© 2019 Boomer Consulting Inc. All rights reserved.

BOOMER
CONSULTING, INC. 



ACTION PLAN



TAX TRANSFORMATION
S U M M I T
NOVEMBER 3 - 5, 2019

© 2019 Boomer Consulting Inc. All rights reserved.

BOOMER
CONSULTING, INC.

**PLANNING TO MAKE A PLAN
IS NOT A PLAN**



TAX TRANSFORMATION
S U M M I T
NOVEMBER 3-5, 2019

© 2019 Boomer Consulting Inc. All rights reserved.

BOOMER
CONSULTING, INC. 

The Continuous Improvement Approach to Leading Change

Alignment

- Create a strategy for change
- Elevate a change leader
- Include the Voice of the Client

Awareness

- Leverage talent for the firm of tomorrow
- Address the emotional side of change
- Seek progress not perfection

Accountability

- Define and track success metrics
- Make success metrics visible and transparent
- Leverage peers and outside resources

Acknowledgement

- Develop a feedback system
- Celebrate successes
- Lead with courage!



THE CONTINUOUS IMPROVEMENT SCORECARD

Arianna Campbell



Download the Continuous Improvement Scorecard

www.boomer.com/taxsummit



TAX TRANSFORMATION
S U M M I T
NOVEMBER 3-5, 2019

© 2019 Boomer Consulting Inc. All rights reserved.


BOOMER
CONSULTING, INC.





Contact Information:

 arianna.campbell@boomer.com

 www.boomer.com

 [@Arianna_BCI](https://twitter.com/Arianna_BCI)

 [in/ariannacampbell/](https://www.linkedin.com/in/ariannacampbell/)

 [campbell.arianna](https://www.instagram.com/campbell.arianna)



TAX TRANSFORMATION
S U M M I T
NOVEMBER 3 - 5, 2019

© 2019 Boomer Consulting Inc. All rights reserved.

BOOMER
CONSULTING, INC. 