

APRIL 2022

Estate Tax Team decreases process time for customers

Think Lean!

The Estate Tax Team was concerned the review of estate tax returns was not timely and wanted to decrease the time it took to review and close out an estate tax return by issuing a final release letter.



Pictured: Ken Dunbar, Ginger Bailey, David Hall, Angela Phillips, Jessica Clark (Project Lead), and Susan Shore

Not pictured: Kent Thompson (Project Lead), Renee Rhodes, Jeanette Bashaw, Thuy Huynh, Jonica Esmele, Malissa Antonelli, Allison Wentz, Charles Wilson, and Chris Vo

PROBLEM STATEMENT: In November 2020, 44% of estate tax return inventory was less than 9 months old. The team's target was to have 54% of inventory be less than 9 months old by June 2021.

A process improvement team of employees from Audit, B&FS, and TAA was formed to improve the estate tax return review and close out process.

The Team's improvements have already saved them at least 1,199 hours of staff time.

Improvements



Eliminated 3 process steps, saving at least 45 minutes per return.



Reduced the error rate by 25%, saving at least 5 minutes of examiner time.



Reduced the overall process time by 37 days, which means customers' returns are accepted quicker.



Created an estate tax Excel spreadsheet to help customers calculate taxes.



"I LOVE the excel version of the estate form! This workbook makes so much sense, thank you for doing this! And thank you for making it calculate!"

— Pauline Woodman

"I am really proud of the Estate Tax Team. Change is hard, and they dove in and brought their energy and ideas to the Lean event and the work that comes after! Their commitment to making incremental improvements is benefiting their customers' experience."

— Monica Townsend, Audit Program Manager & Sponsor

"Building the form in Excel is a fantastic idea! I was excited to use it!" — Christy Upton, CPA