McGladrey

A new PDF standard

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McGladrey

Top accounting firm saves hundreds of thousands of dollars, slashes software license management time 98% by standardizing on Adobe® Acrobat®

McGladrey
Minneapolis, Minnesota
http://mcgladrey.com

View the video

The demands on the accounting profession have changed in recent years, driven by increasing regulatory complexity, new accounting standards, the need for specialization, and other trends. These demands, in turn, have spurred increased reliance on technologies that can assist accounting professionals in more efficiently preparing returns, processing audits, and securely sharing confidential information with their clients and government entities such as the Internal Revenue Service (IRS).

At McGladrey—the fifth largest accounting firm in the United States—8,000 professionals in 90 cities collaborate with clients daily to meet their tax and auditing needs. To support the firm's accounting staff, Desktop Manager Matt Corcoran centrally manages the thousands of desktop and laptop systems and myriad software applications for all locations. He helps ensure that the firm's accounting professionals have the tools they need to meet compliance requirements, increase revenues, and surpass clients' expectations.

"A key part of my job is ensuring that all our desktop software is licensed, up to date, and manageable, as well as keeping technology costs in line," he says. "We provide all of our users with a PC, a standard software image with the firm's most commonly used software, and a responsive service desk to answer questions."

"Our firm is very conservative costwise, so I based our estimated savings on growth of Acrobat licenses alone. I calculated that we would save $600,000 over four years by standardizing on Acrobat, and that did not even begin to factor in all the IT time and effort we would save."

**Matt Corcoran
Desktop manager,
McGladrey**

Watch the video

PDF: the cornerstone of productivity

The firm uses a variety of software applications for processes such as preparing tax returns and audits; however, to support paperless workflows and automate processes, McGladrey has standardized on PDF. The paperless workflows supported by PDF increase efficiency and productivity by enabling easy, secure collaboration with clients. PDF also streamlines document management and supports critical document-based processes such as e-filing with the IRS.
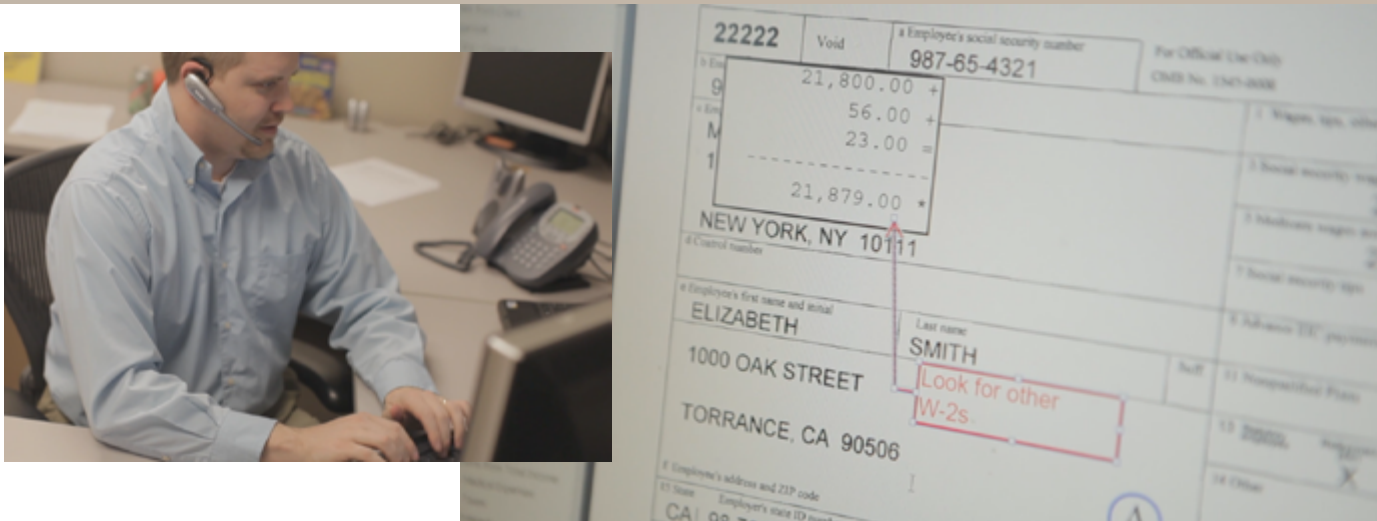
Providing a fully licensed, up-to-date solution for supporting PDF documents and workflows is a core part of Corcoran's job. Until recently, however, the ability to procure and manage software related to generating and managing PDF files was challenging, costly, and time consuming.

"We are very geographically dispersed—and, as part of our entrepreneurial culture, users here are free to purchase or download tools in addition to our standard software image to meet their needs," says Corcoran. "To support our substantial use of PDF, our accounting professionals had acquired a mix of many different versions of Adobe Acrobat software, as well as other PDF applications."

Taming complexity and costs

Over the years, the proliferation of PDF applications had increased the firm's IT complexity and costs substantially. Corcoran estimates that he and his team spent 100 hours or more annually on manual software license management related to PDF. IT staffs in all 90 offices also devoted an inordinate amount of time tracking software licensing locally using individual spreadsheets.

Challenge
- Reducing software costs, licensing risks, and IT complexity
- Simplifying enterprise software deployment and management
- Supporting critical processes such as e-filing
- Maintaining end-user productivity

Solution
- Provide Adobe Acrobat as the standard PDF solution for over 8,000 systems via the Adobe Acrobat Enterprise Program (AEP)

Benefits
- Saved $600,000 over four years, while reducing software management time by 98%
- Streamlined desktop deployment by making Acrobat part of standard software image
- Improved interoperability with other accounting tools
- Supported productivity and secure document collaboration

Toolkit
Adobe Acrobat Standard

"We have 100 different departments," says Corcoran. "People leave, offices combine, department numbers combine—this made tracking software licensing around PDF tools a costly, time-consuming, and often inaccurate exercise."

Maintaining security added to the challenge. The IT team needed to install updates for multiple versions of Acrobat software to keep everyone on par with the software's latest security features and enhancements. This complicated deployment to end users, consumed time, and inevitably increased service desk calls.

Manual software license management also led to budgetary surprises. "A department over a year might see a 1,000-seat jump in Acrobat users, and it makes software administration much easier knowing that everyone has easy access to the latest release of the software," says Corcoran.

Acrobat: an easy choice
A turning point in the company's IT strategy occurred when the firm's other PDF applications would not work properly with the main software for preparing tax returns. At about the same time as Corcoran discovered this critical deficiency, he also initiated a Six Sigma licensing project designed to take a hard look at how the firm was managing software licensing. He also conducted a more accurate count of current Acrobat licenses and found gaps in both best practice processes and licenses.

Based on a recommendation from another firm, Corcoran began investigating an Adobe Acrobat Enterprise Program (AEP), a program available for purchasing Acrobat for every desktop. He learned that the Adobe AEP would equip accounting professionals at McGladrey with the latest, industry-standard tools to support secure, paperless PDF workflows and processes, while reducing IT costs and complexity.

"Our firm is very conservative costwise, so I based our estimated savings on growth of Acrobat licenses alone. I calculated that we would save $600,000 over four years by standardizing on Acrobat, and that did not even begin to factor in all the IT time and effort we would save," he says.

Cost-effective, easy deployment
The Adobe AEP would also help shore up any deficits identified in Acrobat license counts at a cost savings. Having signed the agreement, Corcoran and his team implemented Acrobat to 8,000 desktops within the organization.

> *"Everybody I talk to here loves Acrobat. It's proof positive that when you need a solution to support PDF, by far your best choice is Adobe. No one is requesting or inquiring about other tools for supporting our PDF workflows any longer. With Acrobat as part of our standard enterprise image, our users have everything they need."*

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Corcoran says the deployment went well with one key lesson learned. The firm's accounting professionals spend a large amount of time working from client locations, hotels, and other remote locations, so taking care to help ensure fast, smooth software downloads across a variety of bandwidths was a major consideration. After initially providing one standard download package, the IT team quickly changed their strategy and provided low-, medium-, and high-bandwidth options, along with an estimated download time for each. Users were also able to delay their Acrobat downloads if they wished.

"Like most accounting firms, we bill by the hour and minute, so any business interruptions are unacceptable," says Corcoran. "With the flexibility to adjust to accommodate different download bandwidths, we can roll out Acrobat easily to our users enterprise-wide."

Accounting for the benefits

The enterprise program with Adobe has streamlined Acrobat licensing and deployment on an ongoing basis. Today, Corcoran spends about two hours annually tracking and updating Acrobat software licenses—a 98% decrease over the previous time spent by IT. He contacts HR for the current number of employees, and then enters that number into the company's e-procurement system. After that, he can simply add the latest version of Acrobat into the firm's standard software image for deployment across locations.

The Adobe AEP has taken the guesswork out of licensing, saved the company hundreds of thousands of dollars, and made it easier to manage desktops. The new version of Acrobat has also garnered rave reviews among users who rely on it daily to increase their efficiency and productivity and better serve clients.

The Adobe software operates seamlessly with the other tools accounting professionals use for processes such as preparing tax returns. The newest version, Adobe Acrobat X, also provides robust support for transforming documents to and from Microsoft Excel—a critical feature that accountants use as they move back and forth between formats. Based on the company's experience with competing PDF applications, none could achieve the superior levels of performance and accuracy of Adobe Acrobat.

"Everybody I talk to here loves Acrobat. It's proof positive that when you need a solution to support PDF, by far your best choice is Adobe," says Corcoran. "No one is requesting or inquiring about other tools for supporting our PDF workflows any longer. With Acrobat as part of our standard enterprise image, our users have everything they need."

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