

# Accounting Firm Streamlines Paper Processes with Nuance Power PDF.

## Challenge

- Create fillable PDFs for client intakes
- Needed searchable PDFs
- Protect PDFs with passwords

## Solution

- Nuance® Power PDF 2.0

## Results

- Time savings—50% less time to convert Word documents
- Clients, charge clients less money
- Ability to separate and combine PDF files with ease
- Can provide more efficient service to clients

## Summary

Accounting firms traditionally deal in paper, and LeWalt Consulting Groupe, LLC is no different. The St. Petersburg, Florida-based firm, which handles sophisticated individual tax returns, as well as businesses, needed to be able to create, manipulate, and search PDF documents to serve its clients more efficiently and securely. Any PDF product it chose needed to have version control capabilities to ensure the documents' integrity, as well as e-signature features to allow clients to electronically sign documents.



“Power PDF is a great tool for working with PDF forms, and there is a lot of functionality in the program. I haven’t found anything I don’t like about Power PDF.”

John Walters, Managing Member  
LeWalt Consulting Groupe, LLC

To streamline information gathering, LeWalt Consulting Groupe needed the ability to create fillable forms for clients. The firm had created templates in Word, and being able to convert them to PDF as worksheets or pre-meeting intake questionnaires would save time for both them and their clients.

#### **Strengthening an existing relationship**

LeWalt Consulting Groupe already was familiar with Nuance products; the company had been using previous PDF products, as well as Dragon transcription programs and OmniPage. Because LeWalt Consulting Group wanted to consolidate its PDF tools into one program, it began examining its options. Competitor solutions had an unpalatable price point and clunky interfaces, but LeWalt Consulting Group found exactly what it needed in Power PDF. It could perform all the same functions as competing solutions, and it would allow users to do everything with PDFs that they were able to do with Word documents.

Additionally, Nuance® Power PDF would give LeWalt Consulting Groupe signature features, as it was in the process of converting to electronic documents for tax returns. It was often a challenge to get documents back after signing, and this would allow clients to electronically sign their returns and send them back to LeWalt Consulting Groupe for filing.

“We used so many other Nuance programs that we said, ‘let’s try this one, too,’” recalled John Walters, Managing Member.

After two years with Power PDF 1.0, LeWalt Consulting Groupe made the decision to begin upgrading to Power PDF 2.0. “It has more features and functionality, plus when I saw the video Nuance produced and how the ribbon is like Microsoft Office tools, it seemed like an even easier way to use the program,” Walters said. Power PDF 2.0 also came with a training video, which helped sway the firm in its purchasing decision

#### **Documents converted in half the time**

The biggest benefit for LeWalt Consulting Groupe is saving time. The consistent user interface, integration with products like Paperport and Microsoft Office, and the ability to rapidly turn Word documents into fillable forms has been a huge help. The conversion from a Word document to a PDF form itself takes less than half the time it otherwise would, which means that LeWalt Consulting Groupe can focus on its clients instead of wrangling its technology.

Additionally, the assistant to the small office—three people, total—enjoys how easy it is to combine and separate files with Power PDF. The learning curve wasn’t steep at all, and by all accounts Power PDF has been instrumental for the firm when it works with PDF forms. The firm also appreciates the ability to use password protection when it needs to send documents via email or a cloud file sharing service like Dropbox.

“I haven’t found anything I don’t like about Power PDF,” Walters said. “Overall, I think it’s a great program, and everyone here seems to like it.”

To learn more about Nuance document imaging solutions please call 1-800-327-0183 or visit [nuance.com](http://nuance.com)

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