**pdfFiller**

# Assisting compliance consultants with document preparation: pdfFiller for Vallon Consulting

**Interviewee's name:**



**Rowena Thornton**
CEO/Managing Director
at Vallon Consulting LLC

**Customer profile:**

Vallon Consulting specializes in compliance services for the trucking industry. A team of 12 people started using pdfFiller in early 2020, following the recommendation of a business partner.

## Problems faced before pdfFiller with traditional pen-and-paper document workflows:

**01**   Amount of time spent on document preparation for nearly identical document types and form content.

**02**   The entire team is essentially virtual, having no physical office. Thus, tools for document preparation needed to be virtual as well.

**03**   Working with trucking companies means your customers are on the road 99% of the time, with no access to a printer or scanner, and no exact physical address for arranging document delivery.

**04**   Environmental concerns over the amount of paper used.

> "

I needed a platform that could merge documents together, edit them, sign them, then email or fax them. Ideally, all in one. I was introduced to pdfFiller last year. So I just went and got an account for myself, and have been using pdfFiller ever since. It makes my life easier, especially considering that we are filling out pretty much the same documents continuously.

**Rowena Thornton**

# Problems solved with pdfFiller

**01**  Document delivery became much more efficient since all documents are now emailed or e-faxed from the same platform.

**02**  Impressive time-saving, even with the number of clients steadily growing all the time:

> Downloading a document, filling it by hand, and then scanning it again was always a hassle, but it can be acceptable when you are small and have 20 clients only. You might still have time for that. But when you are looking at hundreds of clients at a time, or even thousands, as it soon will be with us, you simply do not have time for stacks of paperwork.

**03**  Positive overall effect on productivity:

> **"Quicker turnaround time** for signed documents means **more productivity,** it means we have more time for other, more important tasks."

**04**  Complete elimination of technical hiccups. Excluding printers and scanners from a document workflow means no blurry scans, no lost pages, and no more missing signatures on documents.

> It used to take a few days, sometimes even weeks, because a client might not have the paperwork at hand, forgot it, or a page got jammed. And now, with pdfFiller, the whole process of signing documents is just instant.

**05**   Transparency in workflows and better signing practices

Having an organizational account in pdfFiller means every team member can easily check which documents have already been prepared, sent to clients, eSigned, and returned. Team members can also reuse document templates that their colleagues prepared earlier.

On the customer side, having digital flows organized via pdfFiller leads to better document practices and greater accountability:

**"With everything digitized**, we can now instantly see who received <u>documents</u> from us, opened, and viewed them. This is definitely a **helpful tool for all of us."**