

How pdfFiller wins against Adobe, PandaDoc, and Formstack: Message Direct's journey to efficiency

Interviewee's name:

David Rolf

Marketing Director at Message Direct

Customer profile:

Message Direct is a call answering service that works with SMEs as well as large enterprises on the local and international levels. The company has three offices located in the UK.

Message Direct offers personalized telephone answering services, virtual receptionists and offices, 24-hour emergency response, call center operations, appointment bookings, and more.

The situation before introducing pdfFiller:

Message Direct was operating a legacy system similar to a CRM with code and scripts that were more than 12 years old. The system required significant manual data input and did not automatically update records when changes occurred. Moreover, the older sales system did not allow Message Direct to review quotes and proposals before sending them, which was a persistent inconvenience for the sales team.

Also, with the gradual expansion of business operations and the acquisition of other businesses, Message Direct had a new, growing need: to ensure all of their document workflows were properly branded.

In early 2021, they started looking for an online solution that could tackle all of these challenges at the same time.

Choosing pdfFiller over the competition:

Message Direct's Marketing Director, David Rolf, is not a newbie to document management or PDF editing software. Prior to choosing pdfFiller, David had experience using both Adobe and PandaDoc.

By the time he started his research into the document management market, Message Direct had already switched to a newer CRM system—Salesforce—and was looking for solutions that had pre-built integrations with Salesforce or could potentially be integrated with Salesforce via Zapier.

Recalling his positive experience with PandaDoc before joining Message Direct, David turned to this solution again, but this time it wasn't able to meet his expectations:



There are limitations when it comes to branding. You basically have to pay their developers so that they build custom docs for you, and even then, it was a little bit hit or miss.

Message Direct also considered Formstack, but it turned out to have several other limitations, the mail merge function being one area where it fell short.

The company naturally considered Adobe as well, as it is one of the most recognizable solutions on the market. However, because Message Direct needed several licenses for the sales team in addition to the Salesforce integration, the total cost was “extreme.”

Interestingly, David found pdfFiller on Zapier’s platform:



I stumbled across pdfFiller while I was looking — quite desperately after PandaDoc — for a mail merge software with Zapier capabilities. I was also looking for something PDF-related that could work with our sales documents. So I found pdfFiller by pure coincidence. Then I did some research and thought, ‘For this price, this is too good to be true!’

Between March and April of 2021, Message Direct switched to pdfFiller and, using Zapier, linked their pdfFiller accounts to their Salesforce CRM system.

Benefits of using pdfFiller’s Salesforce integration:

01 Professional-looking branded quotes that can be quickly changed and repurposed whenever needed

“The main driver for us in this decision was the ability to use our own branded PDFs. The second was the ability of **pdfFiller’s system to play nicely with Salesforce.**”

02 A set of premade templates that are used by the sales team on a daily basis



We have several different templates that the team can use at different sales stages. The whole team loves it because it is so user-friendly.

03 Significant reduction of manual edits made due to automated pre-population of data from Salesforce



The sales team can easily edit the fields before sending but in most cases this is not needed because all data comes directly from our CRM and is already correct and in the right places.

04 Reduced spending on software as an expenditure category



Other software options offering customized branding have really extreme pricing. Compared to the monthly costs of PandaDoc, we are now saving unbelievable amounts of money. Moreover, I don't have an Adobe license anymore which is unheard of for someone in marketing! I just don't need it because now I can open and edit all documents in pdfFiller.

05 Increased document conversion rates due to ease of use on the customer side

“We also have really good conversion rates these days. Partially, that's because the seller's brochure we are sending out now **looks really nice.”**

06 Building trust with customers that are impressed with how documents look



From the clients' perspective, we now get a lot of feedback that our documents look nice. People are constantly asking “How do you do them?” So I actually have recommended pdfFiller to a couple of people already.

Plans for 2022:

As of today, several members of the sales team at Message Direct are using pdfFiller on a daily basis. And there are already ideas brewing on how Message Direct can use pdfFiller internally in addition to externally—within the support team, for administrative purposes, and so on.

Message Direct is also considering pdfFiller's integration with signNow, an eSignature solution that is a sister product of pdfFiller:

“We’ve already looked at the proof of concept, **and signNow can certainly work with our workflow.** It is really cost-effective, lightweight and easy. Besides, once eSigned with signNow, the document can then fly back to our Salesforce system. **And this is exactly what we need.”**