



CASE STUDY

How Select Security Uses Formstack to Create Efficient Business Processes

Select Security is a security systems dealer headquartered in Lancaster, Pennsylvania.

Founded in 2003, the company offers a variety of electronic security and life safety solutions, including home security, business security, fire protection, home automation, and access control.

Out of an estimated 12,000 to 15,000 security solution providers in the United States, Select Security is currently the 37th largest. The company has been included on the Inc. 5000 list of fastest-growing private companies in America for the last two years and is projected to double in size over the next year.

Joseph Mitton is the Director of Marketing and Communications and a member of the Senior Leadership Team at Select Security. Mitton first came across Formstack in 2012 while looking for a way to automate the creation of customer contracts for the sales team. After exploring a few different solutions, Mitton landed on Formstack and thought it was a great fit.

“The ease of building forms, the data security, the integrations with tools like WebMerge, the field logic—pretty much everything Formstack offers was exactly what we were looking for,” Mitton said.

After using Formstack to automate sales workflows, Mitton quickly realized that the online form builder could be used throughout the business to create more efficiency. Now, Select Security uses Formstack in nearly every department for a variety of informational needs.

Here’s the full story:



The Initial Challenge

In 2012, Mitton was part of a committee tasked with finding a way to streamline a cumbersome sales process. The committee was specifically looking for a tool that would collect information for customer contracts and pass it to corporate without residing on the salespeople's laptops or tablets.

Formstack's functionality was just what Select Security needed and then some. One big draw was the WebMerge integration, which allowed the sales team to create polished contract documents from the customer information they collected. Formstack's Data Encryption and Conditional Logic features were also key for Select Security, allowing the company to manage data securely and guide submitters through a form.



Sales

- > To gather new customer information
- > To generate customer contracts

Human Resources

- > To gather new employee information
- > To accept nominations for employee recognition

Marketing

- > To collect event registrations
- > To capture general website leads

Finance

- > To create expense reports
- > To manage customer billing

Customer Service

- > To create and send customer satisfaction surveys (linked to Act-On)
- > To accept customer account change requests

The All-Business Solution

Shortly after using Formstack to automate contract creation for the sales team, Mitton began exploring the use of Formstack to automate other business processes. Through Senior Leadership meetings and conversations, he started to hear about areas in the business where more efficiency was needed. So he began proposing that the company use Formstack more and more. Now, the online form builder is used by nearly every team.

Select Security uses Formstack's enterprise forms for processes in sales, human resources, marketing, finance, and customer service. Some of the key ways they use the data management solution in each department are shown on the left.

"If you look around, there are always going to be more ways you can use Formstack to reduce roadblocks and hurdles within your business and to create a more efficient operation," Mitton said. "I don't think a week has gone by that we haven't ended up creating a new Formstack form to solve an issue."

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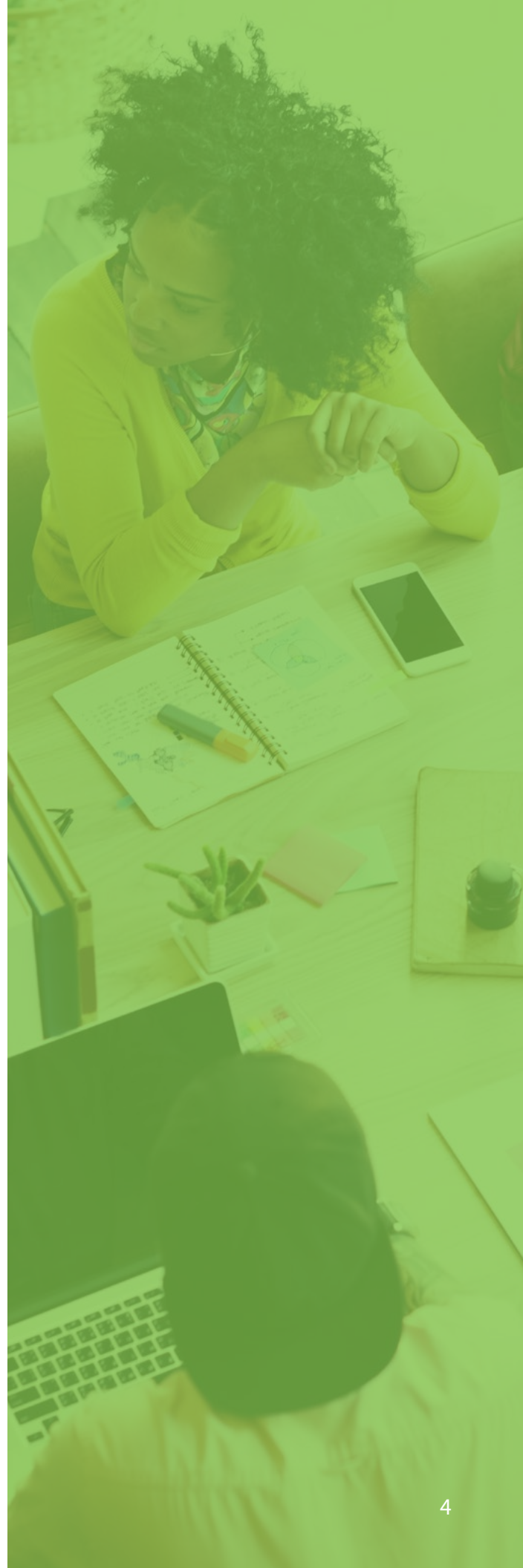
Joseph Mitton
Director of Marketing and Communications
Select Security

The Growth Advocate

According to Mitton, Select Security is currently in aggressive growth mode as a company. Already the 37th largest security systems dealer in the United States with ten offices spread across four states, the company is projected to double in size over the next year.

As part of the internal growth process, Select Security has formed cross-departmental committees to evaluate its core business processes. Some of the business processes in place worked well in the company's early days when it was a small business with just a few employees. But now that the company has nearly 200 employees and multiple offices, more streamlined processes are critical.

The growth committees have already made some strides in revamping the company's processes, and Formstack has played a role. For example, Select Security salespeople use forms to collect information and pass it to the necessary departments. But the paperwork used to be in several different formats: Excel files, Microsoft Word docs, and hard-copy papers. Using Formstack, Select Security consolidated all of those documents into an electronic form that allows salespeople to collect information, create legible documents with WebMerge, and easily shuttle the documents off to the people in the departments who need the information.



“Our sales team has seen a significant reduction in the amount of time they spend doing non-revenue-generating activities because it’s easier for them to fill out the online forms,” Mitton said.

Mitton loves what Formstack has allowed Select Security to do throughout the business. It’s a versatile tool that can be used to solve problems and save time for multiple departments, and Select Security has seen that first hand.

“We’re a company that’s really built on internal discipline,” Mitton said. “That’s how we’ve been able to grow so fast. That’s how we’re able to be one of the most successful security system companies in the area, if not the U.S. And that discipline really lends itself well to a service like Formstack, because what we’re looking for at the end of the day is a way to create efficient processes and really procedure our lives as much as we can.”

The Takeaway

Using a versatile online form builder like Formstack can help you automate workflows at your organization and get more work done. If you’re interested in seeing how Formstack can help streamline processes across your business, click below to sign up for a free trial.

[SIGN UP FOR A FREE TRIAL](#)