



CASE STUDY

# How KleenMark Used Formstack to Create Standardized Processes for Human Resource Management

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[KleenMark](#) is a commercial cleaning and facilities services company headquartered in Madison, Wisconsin. The company provides cleaning services and janitorial equipment for a range of large facilities, including commercial office spaces, school districts, hospitals, and manufacturing plants.

Josh Haroldson is the marketing manager at KleenMark. He first found Formstack as a form-building solution for KleenMark's two content management systems (CMS), [Drupal](#) and [WordPress](#). Formstack's usability and flexibility were big draws for Haroldson. He was able to integrate Formstack with the necessary CMS tools, as well as test KleenMark forms and share captured data in user-friendly ways.

"We're a small- to medium-sized business, so we don't have unlimited resources in terms of time, money, people, and expertise," Haroldson said. "That means we need tools like Formstack that are very flexible and easy to use."

Shortly after Haroldson started using Formstack for marketing, the KleenMark recruiting manager came to him seeking a tech solution for a human resources problem. KleenMark was receiving a high volume of new hire requests via email, and the process was becoming difficult to regulate. Using Formstack, Haroldson helped the HR department create a hiring request form, which has greatly increased the visibility of new hire needs and eliminated nearly 2,000 hard-to-manage email threads to date. standardize the approval process for adding new foodservice customers to the Twinings database. Using Formstack, Twinings has cut an average of two days off this internal process.

**Here's the full story:**

## The Challenge

KleenMark employs almost 1,000 cleaners who work out in the field, and new cleaners are always in demand as the company takes on new accounts or cleaners change positions. Before Formstack was implemented for human resource management, account managers would email the HR team to request a new hire. This was an inefficient process that was hard to track due to the large volume of requests that were submitted.

“When you’re using email, it’s really hard to standardize your system and keep track of where things are in the recruiting process,” Haroldson said. “You’re left waiting on email responses and wondering about the status of your request.”

*“I look at Formstack like a bucket of legos. It’s got all these pieces, and it’s just up to our imagination to figure out exactly how to use them.”*



**JOSH HAROLDSON**  
MARKETING MANAGER  
KLEENMARK

## The Formstack Fix

KleenMark decided to create a Formstack form to manage new hire requests. Haroldson helped the human resources team get a prototype form ready for testing within an hour.

To date, nearly 2,000 requests have been submitted through that form, saving KleenMark a lot of time and effort by streamlining processes and eliminating thousands of back-and-forth emails.

Moving new hire requests to Formstack helped Kleenmark give the process some necessary standardization. Recruiting team members now trust that they will get all essential information from account managers since the form includes required fields. And account managers now know exactly what information they need to gather to submit a request. Additionally, the KleenMark new hire request form uses hidden fields to include information on the status of each request. Recruiters can edit submissions to indicate when a position has been filled and who filled it.



“Not only has Formstack cut down on the communication and confusion for account managers in terms of making the request, but it has also helped them with follow-up because they are able to use the Formstack dashboard to check on the status of requests,” Haroldson said.

Formstack’s mobile-friendly forms and customizable reports have also helped KleenMark with managing human resources by streamlining processes. Now, account managers who are out at job sites can submit a new hire request immediately from their iPhones or iPads. And they can more easily view all current requests and search those requests by location or other variables.

This systematic process created through Formstack has cut off at least two days from the workflow for each new customer approval. It has eliminated a lot of downtime from an approver being away on vacation or not seeing the email. Each approver gets a very direct email with a custom subject line, and all approvers can sign off on the request from anywhere.

## The Human Resources Hero

Since rolling out the new hire request form in Formstack, KleenMark's HR team has leveraged the tool for managing human resources in a few other notable ways:



### Onboarding New Hires:

KleenMark decided against spending thousands of dollars on an educational platform and instead built an entire training program in Formstack.

When new employees start at KleenMark, they complete an onboarding form. After submitting that form, they are immediately routed to the training program. Each training session consists of a multi-page form that has a video on one page and a quiz that uses [Conditional Logic](#) on another. At the end of a session, new hires indicate completion by entering their employee number or an Electronic Signature.



### Tracking Attendance:

KleenMark created a form for tracking attendance violations and other disciplinary issues. This form uses [Electronic Signatures](#), so account managers can get an employee's signature on an iPad or iPhone when out in the field.



### Store Employee Information:

KleenMark created an introductory form for new hires. Employees fill out the form after accepting a position with KleenMark, and their information is automatically routed to KleenMark's current email marketing system, [MailChimp](#). This helps KleenMark welcome new employees and connect with them for birthdays and anniversaries via automated emails. It also saves the human resources department time since no one has to individually track down employee start dates and other basic information.

KleenMark is growing and trying to become a more process-driven company, and Haroldson believes Formstack will continue to play a key role in the company's internal communications processes.

"Formstack has consistently been a great solution for us, and I anticipate that will continue," Haroldson said. "I look at Formstack like a bucket of legos. It's got all these pieces, and it's just up to our imagination to figure out exactly how to use them."

## The Takeaway

Effectively managing human resources requires standardized, efficient processes for collecting and managing employee data. If you're interested in seeing how Formstack can help you streamline human resource management at your organization, sign up for a free trial below.

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