recruitive

ATS Procurement Guide

This guide covers: Stakeholders, Usability , Consulting, Cost, Support & References

What This Guide Includes:

Buying any form of technology for your organisation can be time-consuming and complex, and buying an Applicant Tracking System is no different. This guide will provide guidance in procuring an ATS, giving you all the tools, you need to make the right decision. There are many factors to consider and many stakeholders to have involved in the process.

This guide covers:

Stakeholders – Who needs to be involved?
Usability – How should I assess the usability of a solution?
Consulting – Do I need it?
Cost – How should I assess the costs?
Support – How do I asses a provider's support?
References – Should I obtain them?

Stakeholders: There are many stakeholders included in the Recruitment process overall, even more, involved in the process of procuring an ATS. When procuring, although we need to be mindful of all stakeholders, it is important to manage these stakeholders to ensure their needs are met but, their investigation into the solution does not delay the procurement process. Although all of the below stakeholders will need to be involved in the procurement process, it is important to remember who the three key stakeholders are when it comes to utilising the system on a day to day basis – Recruiter. Hiring Manager. Candidate. More detailed information about these stakeholders in the recruitment process can be found in our – Stakeholders in the Recruitment Process article.

IT: Your IT team will, of course, need to know about any new technical system/software solution you are bringing into the business. With most solutions nowadays being SaaS (Software As A Service) any solution you choose should have minimal impact on your internal IT infrastructure, therefore although IT will have some involvement in the process, it should be minimal. Ask your IT to generate a questionnaire containing all information they require. A limit of ten questions should be sufficient. Share these with your preferred suppliers and if required, ask your vendors to arrange a call between your in-house IT team and theirs. Below are some examples of IT-related questions/information they may require:

- **Technical Architecture**

- **Language Built In**

- **Administration**

- **Support**

- **Servers/Back-Up Policy**

- **Security**

Marketing: When bringing in a new solution you may opt to have your ATS provider design, build and host a careers website on your behalf. You will also have automatic communications being sent from your solution to your candidates on behalf of the company. Any external comms is usually reviewed by marketing. That said, your careers site will, of course, have a different message to your main website (you are selling careers to applicants, rather than your products/services to clients) however, marketing input is always valuable. The key thing is, to make sure marketing are just aware of what is happening. It is unlikely that they vet every communication your recruiter currently sends to candidates but if they would like to be involved in the new standard messaging and branding for all your candidates moving forward – include them. Ensure they are aware, that the project implementation will be on tight timelines, so if they decide to partake, make sure they have the time and resources to provide feedback and input without delaying your project.

Finance: You will, of course, be taking money from the company purse to finance your new solution so your Finance team will need to be aware of the new project. In an ideal world, you should have the budget for the project signed off by finance and anyone else in the business who needs to ok and spend before going to market. This will save you a lot of time looking at vendors who could be out of your price range. Get an initial budget agreed and signed off, then go to market. If you select a solution that is slightly over the budget, you can then go back to finance for the extra approval. Having a budget in mind initially will speed up the purchasing process when you have selected your preferred supplier.
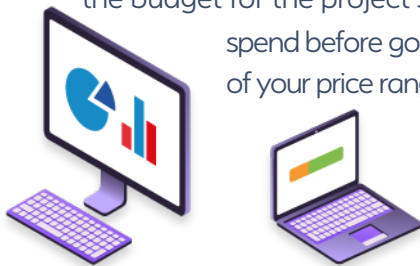
Hiring Managers: Hiring managers are any members of the team apart from dedicated recruiters who will need to utilise your new solution. This includes HR, Senior management, Department heads etc. Before going to market, you must understand exactly what these users need from a solution, be it the CEO wanting a weekly report on where recruitment is at or a department head wanting to check the status of their new hire at any time. Key items are listed below:

Your organisation's process will determine how much access these users need. Some Hiring Managers review all applicants and some organisations have dedicated recruiters to complete this part of the process, so the hiring managers only see the most suitable. It is key that you define your process before looking at the functions required by each user group.

Recruiters: Recruiters will be the main internal users of your system. They should be heavily involved, if not be leading the procurement of your new solution. Your new solution will become your recruiter's desktop, from here they will manage all roles, applicants, requests to recruit, on-boarding and everything in between. A good start is for your recruiter to create a methodical 'wish list'. I emphasis the word methodical, because it is easy to get caught up and just think of one area of pain your recruiter needs addressing. They need to run through the process end to end and identify exactly what they need. Recruitment for all organisations is different based on industry, process, size etc. But there is a general science of the recruitment process and the below flow should help your recruiter think of each stage of the process and what they need from a solution to help them manage it more effectively:

- **Request to recruit**

- **Create a job advert**

- **Create an application process**

- **Create questions and answers to identify suitable applicants**

- **Create a recruitment team for the job (HM, Interviewers etc)**

- **Post Job (Careers Site, Social Media etc)**
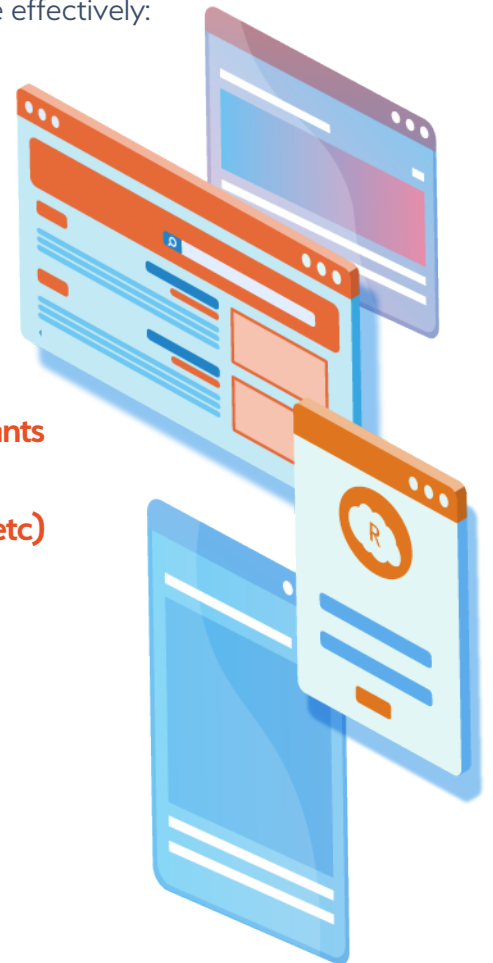
A more detailed sample RFP is available **here.**

Candidates: Candidates will, of course, need to utilise your solution to manage their recruitment process and communicate with your team. All too often when looking at any solution, we want to know what will make our lives easier, but all users need to be considered. In an ideal world, your candidate will have a dedicated area of your solution where they can access any information they need. As a standard the candidate should be able to:

- **Search and Apply to roles**

- **Track their progress**

- **Register for Job Alerts**

- **Upload Documents**

- **Update their details**

- **View information**

- **Communicate with Recruiters/Hiring Managers**

- **View videos and other materials whilst in the on-boarding process**

- **Enter additional data as they progress throughout the recruitment process**
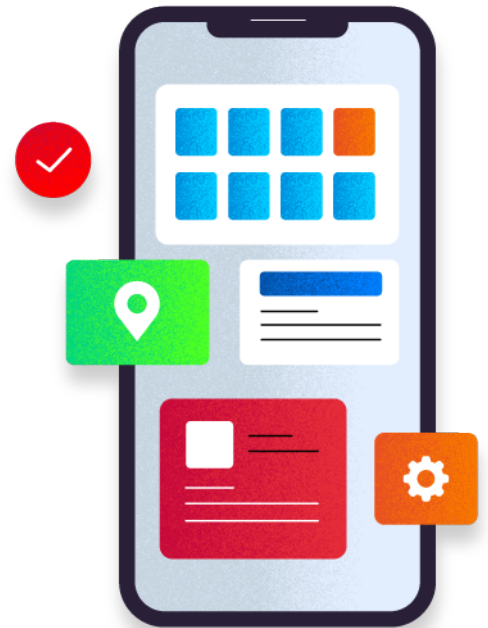
More detail about the candidate experience can be found **here** in the sample RFP.

Usability: It goes without saying that any solution that is implemented to improve a user's efficiency should be user friendly, easy to navigate and easy on the eye. Make sure when you are reviewing demos from your vendors, you can easily follow all the steps they are completing to achieve the aim. If someone is clicking multiple buttons quickly and saying that is how you do x, this is a warning flag. You need to be able to see the process from end to end in a few easy clicks. A few key points should always be considered with any system:

Mobile Optimized: You'd like to think it goes without saying that everything in 2020 should be mobile compatible, but you always need to check.

Branded: Can the solution be branded to your corporate colours? This is important for all internal users so the system really feels like it is yours and your candidate needs to have a consistent branded message so there is a continuation in the process.

3 click rule: Base all tasks on a maximum of a three-click rule. You should always be able to navigate to the screen you need to be on within a maximum of three clicks.

Consulting: Whenever you implement new technology in any department to improve your processes, technology alone does not fix the problem. You need people to operate the technology and processes to be defined and implemented. Most ATS providers should provide consulting to ensure you are not just moving your offline processes online but are making the opportunity to review and identify areas for improvement. Your chosen solutions providers technology and experts in recruitment should work with your internal implementation team, challenge them, and ensure the new solution is optimised to suit your business. Your chosen vendor should be able to provide consulting around:

Support: You, of course, need to make sure you understand the full support available to you during implementation, the post goes live and on an on-going basis. Implementing a new ATS is a big change for any organisation and you need to make sure you have the full support of your provider daily, for the long haul. Below are a few questions to ask:

Who will implement my project?

How big will the implementation team be?

Who is included in that team – IT, Project Manager, Consultant?

What does your standard support system look like?

Is there scope for extra support?

What are your Service Level Agreements (SLA's)?

Do you have a ticketing system?

Do I have a dedicated Account Manager?

Can I speak to that Account Manager without scheduling an appointment?

What training is provided during implementation?

What training is included/available thereafter?

Is all training online or can I speak to a trainer?

Do you offer 'floorwalking' post go live?

References: Any reputable vendor will be more than happy for you to speak to some of their existing clients to act as a point of reference. Include this as part of your initial RFP if this is a task you wish to complete before deciding on a supplier. Keep in mind your vendor's clients will be busy, you are asking them for help so will need to be flexible on when you speak to them or receive a written reference if you prefer. All organisations recruitment processes are different, even if you are fortunate enough to get a reference from an organisation within your industry, do keep in mind that the way they use the solution could be different to how you are planning to use it. A reference should be a factor in making your decision but not an overriding one. It is not advisable to complete references for all vendors taking part in the RFP. My recommendation would be to decide on your chosen provider and award the contract subject to satisfactory reference in the same way you would if you were offering a candidate a job. Below are a few key questions to ask your vendors referees:

How long was your implementation?

Do you feel the vendor-provided adequate support during implementation?

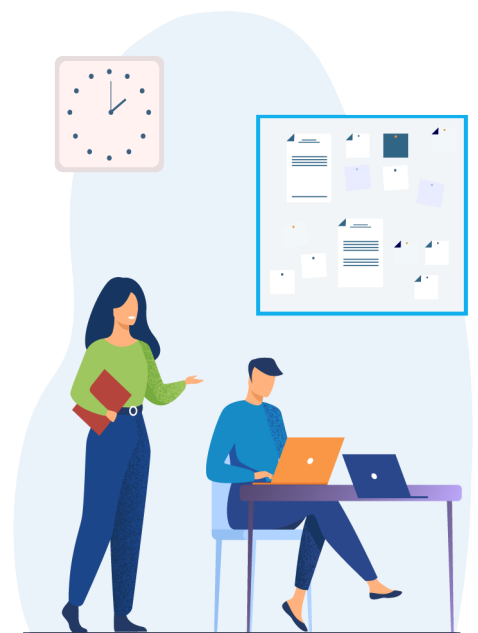**Do you feel the support your vendor provides on an on-going basis is satisfactory?**

Would you choose this supplier again?

What if anything would you change about the solution?

What would you do differently during implementation?

Do you feel the vendor listens to you if requesting changes/improvements to the solution?

Are you happy with your on-going support?

In summary, there is a lot to procuring any new system. Using this guide and our **sample RFP** should help you make the right decision in a timely manner.

Want to know more?

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