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, but buying an Applicant Tracking System doesn't have to be with this comprehensive guide. In this guide we'll go through how to procure an ATS, giving you all the tools you need to make the right decision.

This guide covers:

- How to check whether your new ATS system is the best for your organisation?
- Stakeholders involved in the procurement process
- How to check the usability of your new ATS system?
- How to manage your finances?
- How to assess a provider's support?
- How to ask for references?

Stakeholders involved in the procurement process

There are many stakeholders included in the recruitment process overall, even more, involved in the process of procuring an ATS. When procuring it's important to manage all stakeholders to ensure their needs are met but most importantly you must also keep in mind how your main key stakeholders will utilise the system on a day-to-day basis. Let's take a look at the three main stakeholders involved.

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 your hiring managers will need from your new 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.

Your organisation's process will help to determine exactly what your hiring managers need, some hiring managers will need to review all applicants compared to others who may only need to 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 so they should be heavily involved, if not leading the procurement of your new ATS solution. From here they will manage all roles, applicants, requests to recruit, on-boarding and everything in between. It's always a good start for your recruiters to create a 'wish list' for all their needs, they should do this by running through your process end-to-end and identifying exactly what they need.

See below for some helpful reminders to get your recruiters thinking of each stage of the process and what they need from a solution to help them manage it more effectively:

- 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)

- Request to recruit
- Create a job advert
- Create an application process

Candidates: Candidates will need to utilise your solution to manage their recruitment process and communicate with your team. In an ideal world, your candidates 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

Here are other stakeholders that will need to be included in the ATS procurement process.

IT: Your IT team will need to know about any new technical system/software solution you are bringing into the business and with most solutions being SaaS (Software As A Service) they should have minimal impact on your internal IT infrastructure. As result, although your team will need to know about the new system they shouldn't need a great involvement in the procurement process.

It's wise to ask your IT to generate a questionnaire containing all information they require just be cover all aspects and these should be shared with your suppliers. 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 & host a careers website on your behalf or have automatic communications sent to your candidates meaning any external comms should be reviewed by your marketing team to ensure brand continuity.

The key thing to remember is to make sure marketing is aware of what is happening and can implement any new standard messaging or branding for all your candidates moving forward.

How to check the usability of your new ATS system?

It goes without saying that any solution that is implemented to improve a user's efficiency should be user-friendly, easy to navigate and follow your organisation's look and feel. Therefore, it's important to make sure when reviewing demos from your vendors, you can easily follow all the steps they are completing to achieve the aim.

You'll need to be able to see the process from end to end in a few easy clicks, here are a few key points that should always be considered with any system:

Mobile Optimisation: Although this is mostly standard amongst many vendors, you still need to check their mobile compatibility procedures.

Branded: You'll need to think about whether your new solutions can be branded to your corporate colours. This is important for all internal users as it can make the system feel more personal and give your candidate a consistent branded message.

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.

How to check whether your new ATS system is the best for your organisation?

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 so ATS providers should provide consultations to ensure you're making new opportunities that offer time to review and identify areas for improvement. Your chosen solution provider and experts in recruitment should work with your internal implementation team and ensure the new solution is optimised to suit your business.

How to manage your finances?

Your finance team will need to be aware of the new solution and should have a budget for the system signed off by finance and anyone else in the business before going to market. This will save you a lot of time looking at vendors who could be out of your price range. If you select a solution that is slightly over the budget, you can then go back to finance for the extra approval but overall having a budget in mind initially will speed up the purchasing process when you have selected your preferred supplier.

How to assess a provider's support?

You'll need to make sure you understand the full support available to you during the implementation and aunch process as well as on an ongoing basis. An ATS can bring big changes so 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:

- Can I speak to that Account Manager without scheduling an appointment?
- Who is included in that team – IT, Project Manager, Consultant?
- Who will implement my project?
- How big will the implementation team be?
- 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?
- What training is provided during implementation?
- What training is included/available thereafter?
- Is all training online or can I speak to a trainer?

How to ask for references?

Including a reference as part of your initial RFP can allow you to see what your vendor's clients think of their system. Keep in mind your vendor's clients will be busy, so you will need to be flexible on when you speak to them or receive a written reference if you prefer.

All organisation's recruitment processes are different, so it's important to remind yourself that the way they use the solution could be different from how you are planning to use it. A reference should be a factor in making your decision but not an overriding one. Our 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 vendor's referees:

- How long was your implementation?
- Would you choose this supplier again?
- Are you happy with your ongoing support?
- What would you do differently during implementation?
- What if anything would you change about the solution?
- Do you feel the vendor-provided adequate support during implementation?
- Do you feel the support your vendor provides on an ongoing basis is satisfactory?
- Do you feel the vendor listens to you if requesting changes/improvements to the solution?
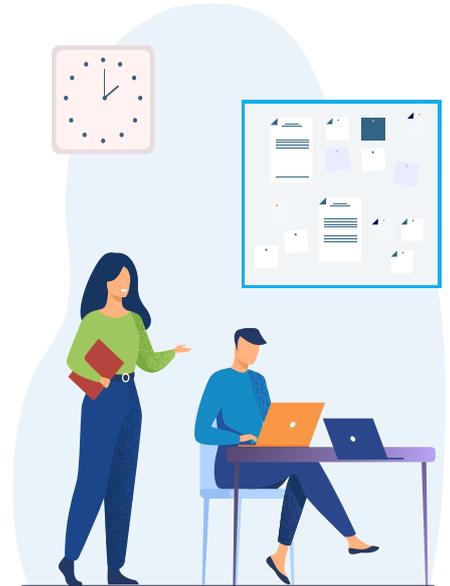
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