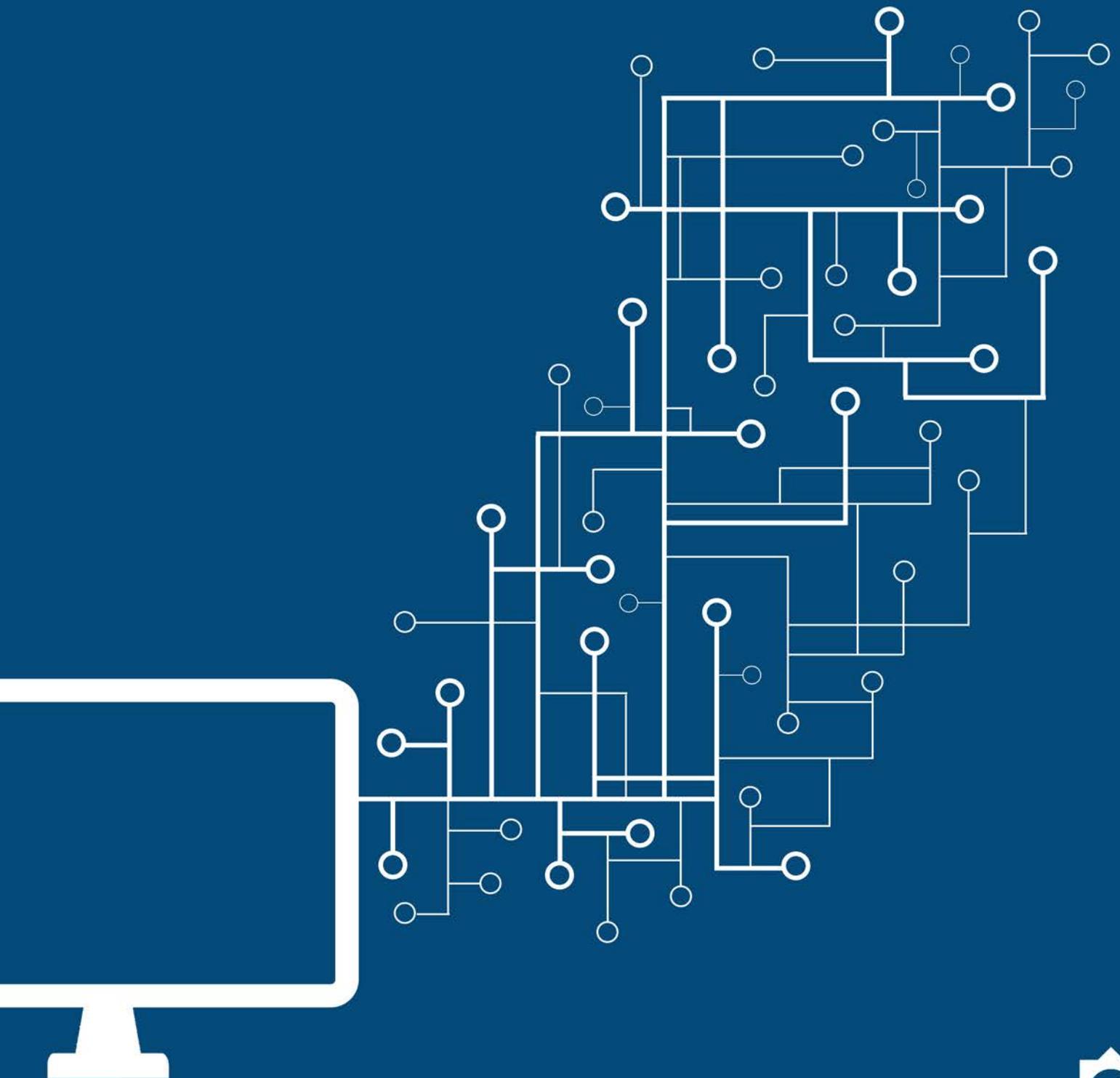


10 Top Tips To Reviewing Your Recruitment Software



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Introduction

The recruitment sector is moving forward at a constantly evolving pace and technology must continue to innovate and support the industry.

Recruitment software plays an integral role in the success of a recruitment agency no matter what size or sector. It enables consultants to efficiently manage their relationships with clients and candidates whilst giving key stakeholders the ability to monitor processes and productivity. With the ability to automate tasks, efficiency can be improved and quality can also be measured with the use of visual reporting tools.

If your current recruitment software is not providing you with the tools you need to succeed then it is likely you are in the process of reviewing. This whitepaper provides you with a complete guide to choosing your next recruitment software and lists the key areas you need to look into to ensure you make the best decision for your business.

1. Why Are You Reviewing?

There are a number of reasons why a recruitment agency might look to review their current software supplier. These generally fall into the following categories:

Current system isn't up to scratch

Your current system may have fallen behind with its functionality or speed and is failing to deliver for your evolving business processes. Recruitment companies often grow in size; sometimes fairly rapidly, so it is important that your system is scalable and able to grow alongside your business.

Start-up business

You might be looking to set up a new recruitment agency and have used software before which you would like to implement.

No current software in place

This is becoming increasingly rare but there are still agencies doing it the old-school way using spreadsheets and paper diaries who are in need of recruitment software.

2. What Do You Want Your New System To Do?

Your new system should work in line with how your business operates. If you have many processes already in place, then mapping them out and identifying your desired functionality should be relatively straightforward. If not, now is the best time to review your current business workflows and evaluate what is being done well but also identify potential areas for improvement.

Functionality

If your current system isn't up to scratch, consultants will often use workarounds. This could be using spreadsheets outside the system, whether it's for to-do lists, availability schedules, current bookings etc. Ideally you want all your data managed inside your system, so that you can measure your consultants' performance using management reporting.

You should ask yourself, are there specific tasks within the business you would like the system to do?

Registration of applicants – How and where is this done currently?

Advertising of jobs/placements – Do you post to your website/job boards/social media?

Data management – Does your current system allow you to utilise all your data? How are you currently managing compliance or other industry regulations? Are there key features or specific functionality missing?

Searching – How do you currently label CVs and skill candidates? Are you able to search all your data?

CRM functionality – How do you track communications and activity between candidates, clients and companies? How much of this do you want automated? How is the interview process currently managed?

Integrations with third-party applications – What third-party applications do you use? How do you currently manage invoicing/payroll? Do you use online timesheets or portals?

Reporting – How is your management team monitoring consultants? Are you able to monitor all their KPIs and activity?

Type of recruitment

Recruitment software is usually an off-the-shelf product, with different systems focusing on different areas of recruitment. Some systems will focus purely on permanent and contract functionality, whereas some will specialise in just temp. However, there are few systems out there that will manage all types to a high standard.

Note: Future functionality is always important to consider, although you may not need it to start with. Make sure you get an understanding of potential suppliers' development roadmaps. It is key to choose a system that can help grow the business, rather than hinder growth plans.

Customer service

There will be times when you need to contact customer support or have a training query. Here are some points to bear in mind with potential suppliers:

- Are they able to support you now and going forward as the business continues to grow?
- If you have multiple offices in different countries how will they support this?
- What are their response times for system and training queries?

Note: Some suppliers are only interested in gaining your business and growing their client base, whereas others are more focused on growing the partnership which will benefit your business a lot more moving forward. Always make sure potential suppliers are clear on their customer service and account management.

3. Choosing Your New System

Selection strategy

Selecting and implementing a new recruitment system is a huge undertaking for any size agency, therefore planning is essential. Having a strategy in place will make the process run a lot smoother as projects without a plan tend to overrun and can often be more costly to your business.

Selection team

Ultimately, there will be a final decision maker who will sign off the new system, but it is important that there are multiple stakeholders involved in the project. The current system underperforming will usually affect several areas of the business both from a user and technical perspective. Having key stakeholders who are currently affected will help give the selection a more balanced approach. It is important that you work with the selection team to formulate a realistic timeframe for the whole project.

Functionality

Your priority in choosing a new system should be to list features and functionality required to support your business objectives. Once you have outlined what you want the new system to do, prioritise each feature into must-haves and nice-to-haves as this will make it easier to score and evaluate each one. Plan out columns for meets, partially meets, does not meet as well as a comment column, which will enable you to score each piece of functionality easily.

Budget

It will be hard to get exact costs to start however an idea of upfront and ongoing costs will soon indicate if your budget is reasonable. Be sure to take all costs into consideration such as licencing, support, data migration and training. This is probably one of the most expensive investments you will make and the rewards can be huge so try to monitor your return on investment.

4. Company Structure and Change Buy-in

The size of your business, how it operates and its growth plans can have a large influence on what type of system is chosen. You need to consider the following:

- How many staff do you currently have?
- Will everyone need access to the new system?
- What are your growth plans for the next year/two years/three years?
- How many office locations do you currently have? Any international offices?
- Are you looking to expand into multiple offices?

Resources

Adopting a new system is a huge opportunity to streamline your business going forward. Now is the best time to look at your current infrastructure and ask yourself the following:

- Do you have servers in place?
- What condition are they in? How old are they? How up-to-date is the software?
- Are all desktops up to spec and performing as they should?
- Do you currently have the internal/external IT resources to support the implementation of a new system?

The company

Implementing a new system is an opportunity to adopt new processes complemented by the new system's functionality. At the same time, if you want to preserve your current processes you need to be looking at systems that closely match them.

It is important to consider how the company will adopt this change. Your consultants are going to be using the new system every day, so it is important that they buy-in to the transition.

There will always be a period of adjustment between the two systems. Training will play a key part in getting your staff to the highest level of productivity in a relatively quick amount of time. Highlight the benefits of the new system internally to reassure staff and help keep productivity high.

5. Web Based or Server Based?

When it comes to reviewing recruitment software one of the most important decisions you will need to make is how you want the new system deployed. This generally comes down to three main options: web based applications (cloud), server based on premise or server based hosted (in the cloud).

What is Cloud?

The term 'Cloud' can be used for a number of different things. If you feel that Cloud is an important factor in your software selection process, you need to be clear with what you mean by it.

Infrastructure as a Service (IaaS)

Cloud can be used to refer to an off-premise infrastructure, delivered as a service (IaaS). Normally this is provided by a third party which essentially replaces all the hardware a business typically has to maintain with an external virtual network.

This setup normally includes all of the Microsoft Office products as well as Microsoft Exchange. It also alleviates you from having to employ an IT specialist to manage and upgrade your physical network/infrastructure and can remove the need to make significant investments for replacements. This is an ideal setup for start-ups and smaller companies.

Remotely accessible system

Cloud or more usually 'Cloud-ready' is also used to refer to a system that can be accessed from anywhere via a web browser (SaaS), Citrix or RDP connection. All web based applications are technically Cloud-ready but will only offer the hosting of the software and relevant data.

Web based applications

A web based system is accessed exclusively via a web browser. All your data therefore is kept on the servers used by the software supplier.

Note: Always check the location of your data. This could impact the terms and conditions with your clients if you are required to keep data based in the UK.

Advantages

- No need for any applications/software to be installed on your users' computers
- No initial investment for server hardware required
- Updates are made by the software supplier and are available to all users instantly
- Can be accessed by authorised users from anywhere so long as they have an internet connection
- Usually low set up costs with a per user per month pricing structure

Disadvantages

- Your data may be difficult and expensive to obtain if you wanted to leave it as it is, kept on the supplier's servers
- Performance/speed of web based applications is dependent on your internet connection
- There will be downtime when the system is being updated so they will not necessarily be able to cater for this around your working hours
- Loss of internet connectivity means you won't be able to access your system at all
- If the supplier's hosted server goes down you will not have any access to the system

- Constant need to upload CVs to the system via the internet can be slow with upload speeds
- Web based applications don't scale as well as Windows based systems so as your business grows, you need to make sure your internet connectivity can cope with the extra traffic

Server based applications (Windows based)

Normally a Windows based system will operate on a client-server basis, where the database is stored on a central server and the application is installed on each users' computer. The central server can be within your network, or it can be external to the business and accessed remotely – Cloud-ready.

Advantages

- The system can operate in a totally closed environment, which can make them much more secure than web based systems
- You will always have access and ownership of your data
- Easy integrations with other applications such as Microsoft Office products
- Performance is under your control as the application is in your network
- The application can be hosted on a remote or virtual server and accessed securely from anywhere via any device using a number of RD clients such as Remote Desktop Protocol
- You control who can access the system remotely using firewalls and additional security
- Multi-task based workflows are possible as forms can stay open in the background while other forms are being used
- The ability to purchase and own your licences rather than renting them – this can add real monetary value to your business

Disadvantages

- Updates may need to be made to all computers that have the client programme installed, although most software suppliers will have developed a way for these to be applied automatically
- To have the new system installed on premise means you will need a server and/or a dedicated PC
- There will be a higher initial outlay if you are buying your user licenses
- Usually you will need an IT resource to support your infrastructure and system
- Performance is based on your infrastructure

Both options have their pros and cons but the most important thing is that you make a decision that works best for your company and the way you work. Ideally, look into both options if they both meet your initial functionality requirements.

6. How Do You Want To Pay For It?

The amount you will pay is largely dependent on how many users you have. A majority of suppliers will have price bands that reduce the cost per user for the more users you have.

There are a range of ways which you can pay for your system which are as follows:

Pay per user per month

Ultimately you are renting the system. This is a fixed cost per user per month based on the number of licences and level of functionality and will continue for as long as you use the software. This model offers the least initial outlay but going forward it is the most expensive. Most web based suppliers will offer this payment model as standard and a lot of server based suppliers will also offer this, either just for the application or the application plus a hosting option.

Note: Some suppliers will try and encourage businesses to agree to a lengthy contract. It is important you look at the total cost to the business for the length of the contract. Also, be sure not to get caught in a situation where the system is no longer meeting your requirements, leaving you cemented with your current supplier for a prolonged period.

User licenses

Most server based suppliers' pricing models involve an initial license cost per user then the only ongoing cost is an annual support charge which is usually 20% of the license cost. With higher initial costs, a lot of suppliers will offer payment plans allowing you to spread the costs. This model is the most cost effective in the longer term.

Rent to purchase

Some suppliers will offer a rent to purchase scheme. You can choose to pay per user per month to start with and then convert to fully paid licenses later. Discounts are usually available on the purchase price, depending on how long you have rented for. This option is particularly beneficial for start-ups looking to keep initial overheads low.

What does the support charge cover?

What the annual support charge covers varies from one supplier to another. With some, it will only cover access to their technical support service where you will be able to contact them either by phone, email or online if you experience a problem with the system. With others, it will also cover any upgrades and updates to the system including release webinars without additional charges.

Other costs

There are several other initial costs you also need to consider at this stage which could include:

- System set up/installation
- Training
- Data migration
- Cost of getting your data out of your current system
- Third-party integrations
- Project management
- Bespoke development

Note: The cost is reflective of the amount of functionality in the system. Cheaper systems will have limited functionality. Some systems will have tiered options – basic packages with limited functionality to premium packages with extra functionality.

7. Choosing Systems To Review

With so many systems now in the market, choosing ones to review can be a lengthy task. A sufficient number of systems to review initially would be six to eight. If suitable, your initial list should comprise of both server based and web based.

When creating an initial list of suppliers, you should consider the following:

- Are there systems you have heard of or used before?
- Word of mouth – Speak to recruiters you know from different companies and see what systems they use or recommend.
- Industry brands such as Recruiter Magazine are a good source of information and many of them have a supplier directory listed on their website.
- Google – The best search terms to use are 'recruitment software' or 'recruitment CRM' but remember that not all the best systems will be on the first page of a Google search.

To get an initial feel for a product and company, their website should be your first port of call.

- Can you get a clear understanding of their main features?
- Does it feature written testimonials from current clients?
- Are there any videos you can view of the system? Remember, not all suppliers will feature videos of their system online.
- Can you see which third-party applications they currently integrate with?

RFIs – request for information

A lot of companies will send out an external list of their requirements in Excel format to the initial list of suppliers. This will help to give you an early indication if they are able to meet your requirements before the demonstration stage.

When arranging demonstrations with suppliers, it is important that you share as much information as you can. This will enable the supplier to get a better understanding of you as a business and make sure their product will allow you to achieve your business objectives. The main areas to consider are:

- Your main requirements for the new system
- Problems you are facing with your current system
- How the company operates and future growth plans
- Initial timescales for the project

Note: A good software supplier will try and extract as much information as possible from you. You should allow at least 10 minutes for an initial phone conversation.

8. Demonstrations

Once you have your initial list together, it's now time to narrow down your preliminary list of potential suppliers to the ones that meet all/most of your criteria.

There are several ways in which you can get a feel for a system, which are as follows:

Online demonstration – This is often the first port of call in the selection process and provides a very effective way of getting a perception of a system. You will be guided around different areas of the system depending on your requirements discussed with the sales consultant.

Face to face – Meeting suppliers in person is always advised at some stage during the selection process. It enables you to involve all the key stakeholders who make up the selection team and run through any specific workflow or questions they might have. It also provides you with an opportunity to get a better perspective of the supplier as a business partner. It is also an opportunity for suppliers to bring key stakeholders from their side such as project managers or training consultants which in turn, helps you to further evaluate them as a business that you can trust and depend on.

Trial – Some systems provide a free trial period that doesn't require a demonstration. This is great for you to get hands on with the system but at the same time, without training and guidance you may find it difficult to get accustomed to it. It is advised to have a trial period once you've had a full demonstration of the system.

Before the demonstration, the more workflow and process you share with suppliers, the better. A thorough demonstration of a system should last between one to two hours but always factor in more time as you are bound to have several questions and scenarios to run through.

Using the spreadsheet you have prepared, score each system accordingly against your feature requirements. You should then narrow down your list to three to five suppliers.

Note: You may find that systems will have different ways of doing similar tasks or a workaround for a missing piece of desired functionality.

It is important that the selection team are involved at the demonstration stage as they will be able to provide points of view from different areas of the business.

9. Shortlisting and Quotes

Now is the time to sit down with the team and put forward the top two systems that meet your requirements based on the scoring you have conducted. It is normal to have more than one demonstration before reaching this stage and it is at this point where you will need to obtain quotes from both shortlisted systems.

Remember that it is not just the initial cost you need to consider, there is also the following:

Software deployment – How do you want to access the system?

- Server based/on premise or hosted?
- Web based/Software as a Service?
- What are the different costs for each?

Training – How do you want your training delivered?

- Do they have a training centre?
- Can you have training online?
- Are they able to come to your offices?
- Do they have a list of off the shelf courses available which cover the different parts of the system?
- Can they conduct bespoke training for your specific requirements?
- Do their trainers have any accreditation? CLPD? COLF? ICTP?
- Is it an extra cost or is it included in the overall package?

Support – What level of customer support is available?

- Is there an additional charge for support?
- Where is the support team based?
- How can they be contacted? Phone? Email? Online?

Data migration – How important is your current data?

- How clean is your data? Any duplicates or missing fields?
- Will you want to bring it all into the new system?
- Do you have access to your current data?
- Is the supplier able to migrate your data into the new system?
- Do they have a structured approach for migrating data?
- Have they migrated data from your existing system into theirs before?
- If you don't have a system in place – do you have your data organised into spreadsheets that can easily be brought into the new system?

Note: Always make sure you are clear on where your data is stored and who owns it. If you are currently using a web based solution, you may be charged to get your current data out of the system. You should also be cautious with suppliers who offer to migrate your data for free as this is often outsourced and not fully mapped to your specification.

Implementation – How will the implementation process be managed?

- Will you have a designated project manager?
- What methodology will they use?
- Is there an extra cost for this?

Bespoke development – Have you requested any additional development to be done to the system?

- When will this be implemented?
- What are the upfront and ongoing costs?

- Will this development be taken into account for any future update or upgrade?

Hardware costs – Is your current hardware able to cope with the new system's minimum technical requirements?

- Do you need to upgrade any servers?
- Are there any additional licences needed? SQL? Microsoft?
- Are all the workstations up to spec?

References

This is a vital step in the process. You should try and obtain references at every opportunity. The supplier should be able to provide references of companies of relevance to you but you should also try and obtain references from users that the supplier hasn't put forward.

Questions to ask current users:

- How long have you been using the system?
- What made you choose this system?
- How large is your company?
- What were you using before and why did you leave?
- Did the implementation of the system go well?
- Do the consultants like the system?
- What are the positives?
- What are the negatives?
- How good is their customer service?
- How long does it take new users to get up and running efficiently?

10. Final Decision

If you have used a well-structured and planned approach to software selection, you should have a clear front runner and have built up a good relationship with the supplier. Once costs have been finalised it is time to look at the terms and SLAs.

You should consider the following:

- Does the length of the contract meet your expectations?
- Are you comfortable partnering with the supplier?

Note: Contracts can be a minefield of legal terminology, it is advisable to get a legal professional to look over them.

Implementation

Once you have signed the contracts and paid any associated deposits the project can get underway. A clear project plan should be put in place by the supplier which will determine key milestones such

as data mapping, test migration, bespoke development (coding and testing), training delivery, live migration, system configuration and go live.

Note: Do you have a preferred date for go live? If so, you will need to work very closely with your supplier to achieve that date.

If you would like to know more about the implementation process, please take a look at the next whitepaper in this series, [10 Top Tips When Implementing Your Recruitment Software](#).

Summary

Reviewing your recruitment software is by no means a quick and easy process and these tips should be able to aid you from start to finish.

As already stated, one of the key steps is to identify exactly why you are reviewing and what you want your new system to do. It's important to bear in mind factors such as the type of recruitment you do, integrations and customer service as these will have an impact on you further down the line.

Ensure you have a strong selection strategy and involve key stakeholders in the process who have all agreed on a budget and list of functionality. It is essential that everyone is on the same page and looking for the same thing.

When reviewing and exploring new options, remember to consider any growth plans your company may have as well as your resources, current IT infrastructure and how you want the system to be deployed. These will all have a large influence on the system chosen.

There are a range of ways you can pay for recruitment software and other costs (installation, training, migrations, etc.) so make sure you have a think about which option is most suitable for your company.

When you get around to choosing systems and demonstrations, ensure you do your research properly. Ask others for their opinions, check suppliers directories and send RFIs to find out as much as possible about each supplier.

Once you have shortlisted your final systems, it's time to obtain quotes and ask for references. These can be a huge help especially when talking to someone in a similar industry who can give you more of an insight on the prospective recruitment software.

At the end of this lengthy process, you should have come to a final decision and it will be time to start thinking ahead to the implementation of your new recruitment software.