The No-Nonsense Guide

Implementing Recruitment Software

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It's safe to say that implementing new software can be a very complex and time-consuming process. Most businesses will only experience this process every few years and for some, only once or twice in their entire existence. It can be overwhelming for all involved and is often underestimated by the majority of businesses.

Not all recruitment software suppliers are the same and all of them will have their own unique way of delivering their solution to you. Whether the software is cloud, server-based or a hybrid of the two, there are few things you should take into consideration when implementing your new recruitment software.

The A Team

Hopefully, you would have followed our previous guide on reviewing recruitment software where we covered the benefits of creating an internal project team. Although some of the team may have only been relevant for the reviewing part of the project, it's important that as many of them as possible are involved in the implementation. This may only be a couple of people, however, they should have:

- A thorough understanding of the business' processes, data and current software
- Been involved in the reviewing process and have good knowledge of the new software
- Strong influence internally and a pro-change attitude

The Software Administrator

One of the key roles within the project team is the Software Administrator. Their role is to take responsibility for how the software will work for your business, support any customisations that need to be implemented and manage who can use or access different parts of the new software. They often become the 'go to' person for all things software related later in the process due to their in-depth knowledge.

To help you pick the right person for the job, we have identified four skills that the Software Administrator requires:

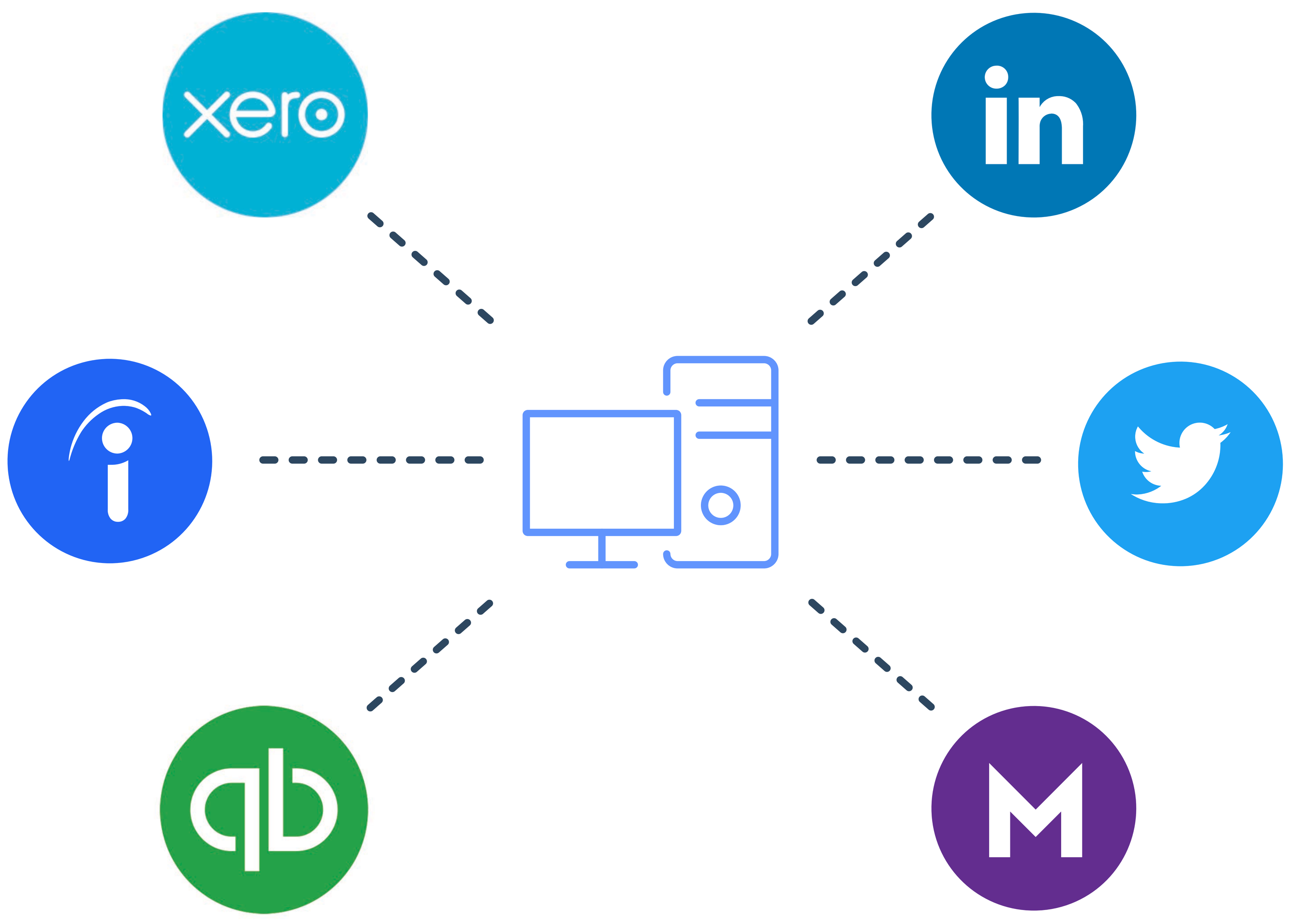
- A good understanding of your business process
- Excellent communication skills
- Knowledge of your company culture, structure, and end goals
- Previous experience with recruitment software administration

The role certainly doesn't need to be a full-time job for an individual but is likely to take up to 30% of their time throughout the project and 5-10% of their time post implementation. Larger businesses may decide to have more than one Software Administrator and share the responsibilities amongst multiple members of staff.

Third Party Stakeholders

It is vital at this stage to involve any third-party stakeholders, as they could highlight key aspects of the project that haven't been considered. This may include your IT, phone and website providers.

Many recruitment software suppliers offer integrations with other tools such as financial packages (Sage, Merit, Xero, QuickBooks, etc.), job boards (either direct or via an aggregator such as Broadbean) and social media such as Twitter or LinkedIn. Understanding how your new software communicates with these tools should also identify who else may need to be involved in the project team either internally or externally.



Getting to Know You

Hopefully you already understand your new supplier and how they work and by now, you should've been introduced to someone who will be your dedicated point of contact throughout the project. This could be a Project Manager, Project Delivery Consultant or a Client Success Manager. Whatever their job title, you will likely be working together for some weeks so it's important you get to know each other.

The Project Managers are the professionals and may use some form of methodology such as Prince 2, Waterfall, Agile or Scrum. It's a good idea to gain some understanding of these methods as they will help you appreciate their approach and how they work.

They will likely be looking to put together a project plan for you. In order to assist your Project Manager in creating this, make sure they are aware of the following:

- Timescales or any definitive go-live dates
- Features and workflows in the software that are most important to you
- Support and training required for your business
- Integrations needed with other software you use
- The users of the software and their capacity (you could send them an organisation chart)
- Access needed to the system (cloud, server or hybrid)
- The data to be migrated to the new system

Your company culture will also say a huge amount about your business. Communicating your mission, values, ethics, goals and even your work environment, can help your new supplier further understand your business.

Get Ready to Kick Off

Now that you and your new supplier have shared information and got to know each other a little better, it's time to start the project. If you are a larger business, your project team may be involved in some of the following steps.

The Kick-off Meeting

The initial meeting will generally be held at your office so ensure you consider the following before confirming a date:

- Securing a meeting or board room big enough for all attendees.
- The use of large screen or blank wall to be projected onto.
- Allowing plenty of time for the meeting.
- Involving as many members of your project team and senior leaders as possible.
- Allowing the Project Manager to bring other stakeholders from their side if they wish (e.g. software trainers).
- Supply refreshments for those attending and make it as comfortable as possible.

Kick-off meetings are generally used to provide an overview and bring everyone up to speed with what will be occurring over the coming weeks/months. This means they may not go into every detail of the project.

Be sure to put together an agenda with your Project Manager and share it with all those attending to help you keep things on track. You may also wish to highlight to your attendees what their roles are in the meeting so they know what is expected of them.

Timescales

You may have already agreed a go-live date with your new supplier so it is vital that you understand what needs to be completed and when. A thorough project timeline will ensure that everyone is aware of each stage leading up to your go-live date.

There will be a few things which may affect this:

- Employees' Annual Leave
- Technical changes or failures
- Unexpected absence or illness
- Loss of a key individual(s)
- Customer or seasonal related commitments or changes
- Operational or procedural changes (planned or otherwise)

It's a good idea to also agree what communication you will have with your Project Manager to ensure that everything remains on track. This could be in the form of a weekly project status call or email.

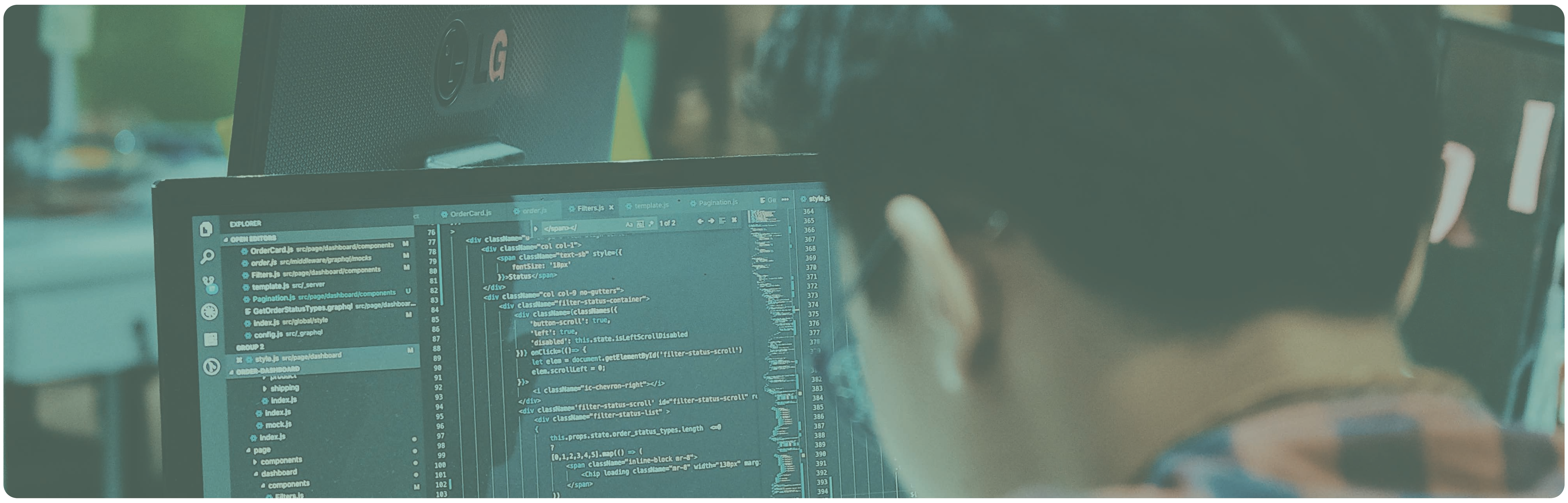
Processes

If you haven't done so previously, now is a good time to share and potentially review your business' processes with your new supplier. This will allow you both to start identifying areas that need the most attention or even additional tools and bespoke work.

You should be willing to adjust your processes or be open to try new things at the advice of your new supplier in order to achieve your results.

The most common areas to consider reviewing are:

- Communicating with applicants and contacts
- Registering applicants
- Creating contacts, companies and jobs
- Sending or Marketing CVs
- Arranging interviews
- Monitoring compliance and documentation
- Placing single or multiple applicants into jobs
- Reporting across the business and individually
- Processing timesheets, payroll and invoices



Data Migrations

Data is often regarded as a recruitment business' biggest asset and moving it around can be very daunting. If you are moving data from an old system or perhaps spreadsheets then this part is for you.

Retrieving Data

By this stage, you should have identified and analysed the data you currently hold within your business and have a good idea of what you'd like transferred to the new software. You will need to give your new supplier access to these data sources (if you haven't done so already) for them to start understanding and working with it.

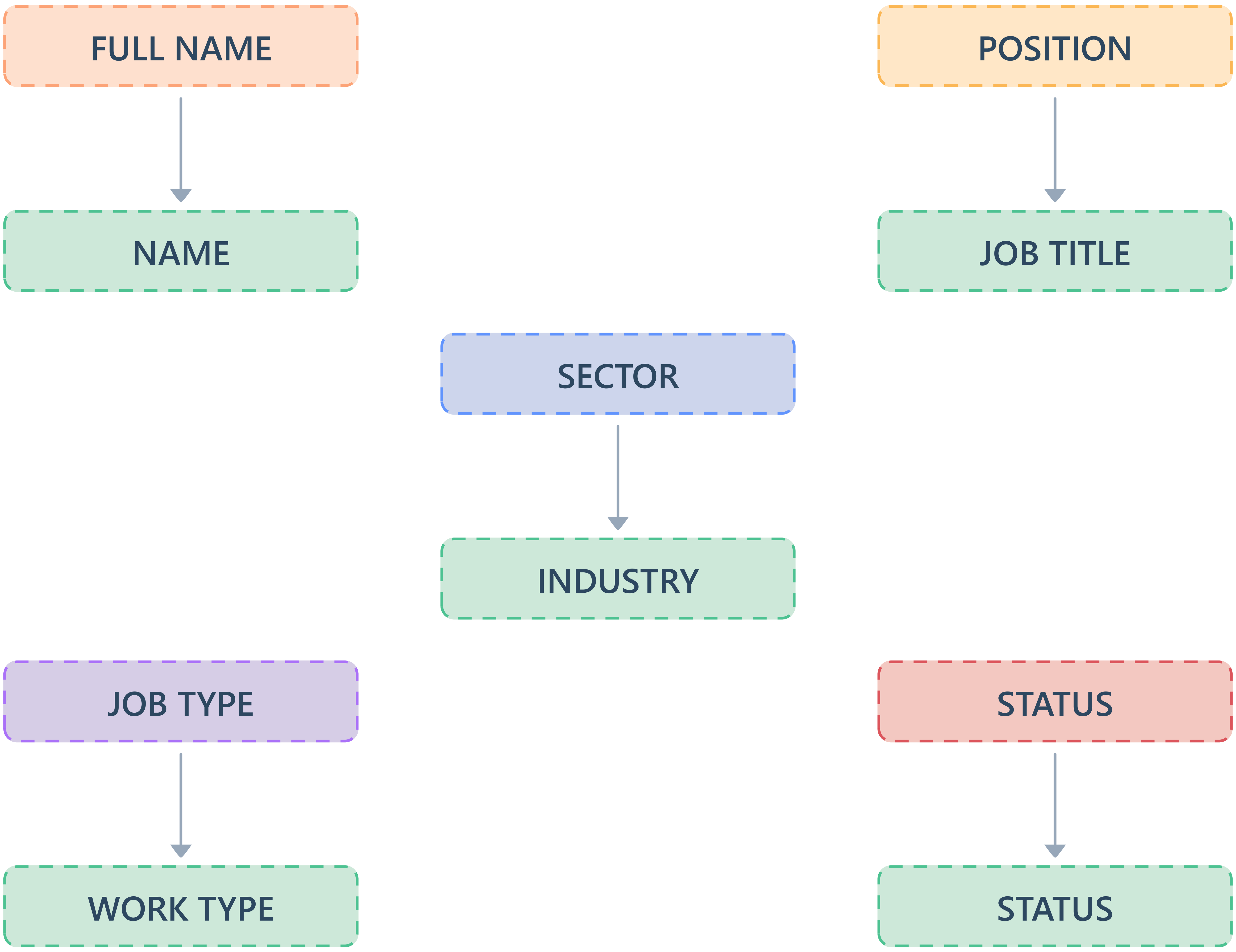
Retrieving your data from your existing supplier (especially if it is hosted in the cloud) can be tricky and may incur costs. It will be your responsibility to ensure that the data is in a recognisable format such as CSV, Excel or SQL so be sure to check with your new supplier prior to getting it extracted.

Cleansing Data

Seeing your data in its rawest form is a great time to start cleansing it. This may involve detecting and correcting (or removing) corrupt, incomplete, inaccurate or old records from a table or database. Ask your new supplier if this is something that can be achieved in the data migration process as it may save you a lot of time trying to figure it out from the front end of the new software.

Mapping Data

Your new supplier should provide you with some form of data mapping document which details where fields in current database will end up. You should take plenty of time to understand this document and make it available to as many members of the project team as possible.



Testing Data

Testing the data that has been migrated to the new software is key to the project and any changes or issues with the data are easily rectified at this stage. You will likely need to sign off the migration with your new supplier so ensuring that everything has been moved across in the right format and in the right areas will be your responsibility. Some larger companies share parts of the data to test amongst their project team and the agreed data mapping document will be able to assist them with this.

Installation

Now your migration is underway, it is time to install your new software. Making sure all relevant people and locations can access it is naturally the main aim here as this will be vital for both training and user acceptance testing prior to go-live.

The installation is likely to be a joint effort between your new supplier and your internal or external IT support. It would be wise to give your Project Manager your IT contact's details to prevent miscommunication.

Server-based

If you have opted for a server-based solution, your IT company should look to set up a server environment ready for the new software to be installed. They may need to ensure that there is ample storage space and processing power available as well as access to any third-party licensing agreements such as Microsoft SQL or Dynamics. Your new supplier should have provided you with some form of technical specification for this.

Cloud

Although most cloud systems are delivered via a web browser, there may still need to be applications installed or configured on users' machines to ensure it works. This may include a specific browser, version of Outlook or even changes to installed anti-virus.

Hybrid

How the software is installed depends on the type of hybrid model. The application will generally be configured on each user's machine, but you have the option to either store your data in the cloud or on your own server. The latter will still give users access on the move, however, will require server configuration similar to the server-based installation.

Configuration

Some more comprehensive software will have a settings or configuration area which can be utilised to set up the system to meet your needs.

This may include some of the following areas:

- Users, emails, permissions and access around the system
- Data quality control and mandatory creation fields
- Automation of process, trigger points and alerts
- Email and letter templates including merge fields
- Drop down values, keywords, statuses and groups
- Customisable fields and layout
- Reporting suites, business intelligence and dashboards
- Document encryption and auditing
- Compliance workflow, process and templates

Your new supplier will likely have specific training material on this, and your project team and/or system administrator should have access to this in order to configure the software to suit your needs.

Training

Training your staff on the new software is by far one of the most important phases in a project. Often it is the first time some of them would have even seen the software and after receiving communications about the change and what is expected from them, training is bound to make this first impression less daunting.

Some key questions to ask yourself prior to booking your training are:

- What type of courses do you want to have? Off the shelf? Bespoke?
- What staff are being trained? And to what level?
- What training materials are available? Manuals? Videos? How to guides?
- Are your supplier’s trainers qualified and what are their delivery methods?
- Where will training take place? On-site? Online? Your supplier’s training centre?
- How will training impact your business? Time? Cost?
- Are there any individual requirements? Learning difficulties? Restrictions?
- Is it feasible to have members within a team trained at the same time?
- Will you need cover for these positions whilst they are trained?

If you decide to have live training, which is often paid for, then it’s worth considering the pros and cons for each method.

	Pros	Cons
Bespoke	• Customisable to your own internal processes and terminology	• Extra cost to design and develop the course(s) • Additional time and resources required to create the course
Off the shelf	• Can be delivered instantly to staff • Cheaper than having a course designed	• Some parts of the course may not be relevant to your processes
Online	• Course can be run over multiple sessions, helping with knowledge retention • No travel costs	• Less hands-on learning • Technology dependent • No face to face interactions
On-site	• Familiar surroundings and environment • Face to face learning	• More expensive • Distractions from office activity • Intensive training delivery
Training Centre	• Away from the office and therefore fewer distractions • Face to face learning	• Delegates required to travel • Time away from office • Intensive training delivery • Unfamiliar surroundings

Involving senior management in any training will give them a thorough understanding of the functionality and best practices within the software, even if they are not directly using it. This will then assist them with making informed decisions with the project team regarding their processes.

User Acceptance

Prior to going live and once all your users have been trained, you will need to ensure they are all comfortable with the new software. As we've mentioned before, communication is key for user adoption and informing them of any new processes or workflows with clear instructions will assist you with this.

In order to encourage the use of the system and user acceptance, many companies run their own internal promotions which may include:

- **Incentives** – Offering incentives and prizes can really encourage users to adopt the software.
- **Competition** – Often users are motivated by competition so you can use leader boards as a tool to drive adoption. Internal quizzes are also a proven way of creating both competition and ensuring users understand the software.
- **Super Users** – Identifying and rewarding the strongest users is a great way of encouraging adoption. This can also lead to greater responsibility for individual users who can then go on to champion the system internally.
- **Enforcement** – Some companies will enforce the work ethic ensuring their consultants use the new software to its full potential. This is particularly important if you have client and candidate ownership.

Go Live Day

It's now time to turn the old software off and fully embrace the new. Your Project Manager will advise on how is best to do this as often your business would've still been using the old software up until this moment. A final copy of data may be required from your old software prior to turning it off, which will then be migrated into your new software. This process is usually done out of hours to avoid any down time or impact to your company's data.

Your new supplier may have agreed to be on-site on the day of go-live to iron out any minor details which is always helpful. This may consist of having your Project Manager and trainer(s) at your office(s) to help support end users with any questions or issues they are having.

If you have followed the above steps there should be little to no configuration or last-minute changes required on go-live day!

Feedback, Support and ROI

To maximise your return on investment and user adoption, it is important to gather feedback from your staff and ensure they have the right level of support in place. Rather than dealing with ad hoc issues, make sure they have a platform to air both positive and negative feedback. As a result, they may feel empowered and assume more ownership of their work and the new software. You may consider one of the following:

- A suggestion box
- A dedicated email address
- Internal Intranet page or platform
- 121, group or even company-wide meetings

Holding regular focus groups between senior leaders and the projects team is another great way of analysing feedback gathered from the end users as well as data extracted from the system. Here are a few things that are generally used to benchmark:

- Financial forecast and income data
- User statistics and activity
- Overall company statistics
- Time taken to create records
- Media, source and job board activity

Comparing current and historic data will not only help the business prove a return on investment but also promote an overall positive message internally. If the end users can see an overall improvement in their KPIs and the business productivity, they may be further encouraged to use the software to its full potential.

Communicating both positive and negative feedback with your new supplier will help them understand how your business is using the software and how they can improve as a supplier.

You should continue to update your users on any additions or changes that get made to the software. This will keep them informed but also show that you are listening, care about what they think and are acting on the feedback they have provided.

If you would like to learn more about how you can get the most out of your recruitment software once it's implemented, take a look at the next guide in this series!

Glossary

Benchmark – In computing, a benchmark is the act of running a computer program, a set of programs, or other operations in order to assess the relative performance of an object, normally by running a number of standard tests and trials against it.

Cloud – The delivery of computing services (servers, storage, databases, software) over the Internet.

Data mapping – The process of matching fields from one database to another.

Hybrid – A computing environment which combines cloud and server-based technology to allow users to install applications on their machine but also access the data from any location.

Server-based – The delivery of computing services (storage, databases, software) which are run on a central server.

Software Administrator – Someone who is responsible for the upkeep, configuration and reliable operation of computer programs.

Technical specification – A document which outlines the technical requirements which must be considered to successfully complete a project.

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