The No-Nonsense Guide

Reviewing Recruitment Software

itris

The recruitment software landscape has changed dramatically over the last few years with a number of mergers, acquisitions and liquidations. As a result, many suppliers now offer multiple solutions which can be confusing.

Some software has advanced to such a degree that often the simplest of tasks can become complex. Others have become outdated with few improvements and a lack of innovation. On top of that, there are now also hundreds of additional tools, integrations, applications and partners needed to support your business.

Every business will have its own unique setup and require different functionality in order to succeed. Should its processes change or systems fail to perform, problems can occur. Whether they are struggling with user buy-in, inefficiency or lack of functionality, their profits are likely to be affected.

If you are fed up of your recruitment software holding you back, it's probably time for a change. But where do you start?

What Actually Is Recruitment Software?

As if recruitment software and all the different features, integrations and suppliers weren't confusing enough as it is, there are also a whole host of names for it too.

CRM	ATS	RMS	VMS
Customer/Candidate Relationship Management	Applicant Tracking Software/System	Recruitment Management Software/System	Vendor Management Software/System

But it's all just recruitment software... Isn't it?

Why Are You Reviewing?

You can't afford your current software

Your current software isn't suitable for your processes

You want to improve user experience

You're starting a new business

You don't have any software in place

Can You Change Suppliers?

Before you rush out to look at new software, there are a few things you'll need to consider beforehand.

Terms and Conditions

Very few suppliers make it easy for their customers to leave and it's more than likely you will be restricted to a term within the contract. This may be an initial term or even a renewal term which can range from 12-36 months. Because of this, it is important you understand the terms and conditions of your current contract.

If you have a monthly rolling contract or are at the end of your term, then you may only need to consider your notice period. Similarly to terms, this can range from 30 days to six months, depending on your supplier.

Alternatively, you may be nearing the end of a lengthy contract which carries an auto-renewal clause, locking you in for another term. Understanding the notice period and renewal dates is crucial so you can start to plan your exit strategy accordingly.

We recommend allowing around six to nine months to review and change suppliers

Project Team

Depending on the size and structure of your business, you may want to consider a team internally to manage the project. The number of people and their responsibilities in this team will often be determined by a number of factors which we will guide you through in the next section.

Management Buy-in

You're not going to get very far in the reviewing process if you don't have the backing from key stakeholders. Not only is their support essential to kicking the project off but also to influencing others in the business.

If you're struggling to get the go-ahead from management, it would be wise to put together a proposal or business case. This should highlight the positive impact recruitment software could have on the business in terms of efficiency, productivity and return on investment as well as estimated costs and timescales.

Cost

Changing recruitment software can be expensive when you take into consideration installation costs, licence fees, additional tools, data migrations and training. If you are not realistic with your budget, this may restrict the type of software or service that you require as a business.

Time is also a cost that is often overlooked when considering software. You need to take into account how much time the project team will take away from their duties and the impact it may have on the business.

What Is Your Strategy?

Prior to kicking off any project, especially one that encompasses change, will mean you need some kind plan or strategy. You know what they say, fail to plan, plan to fail.

Process

Despite different requirements, workflows, teams and timescales, most businesses will follow a general process for reviewing recruitment software.

1. Define Requirements
2. Research & Contact Suppliers
3. Conduct Demonstrations
4. Shortlist Suppliers
5. Conduct Cost Analysis
6. Decision & Implementation

Project Team

As we previously mentioned, you may wish to create an internal team to manage the project. They will be responsible for defining initial requirements, co-ordinating the selection process, communicating and reporting their recommendations to the business and ultimately, driving change. It should include people who:

- Are in different departments and positions in your business
- Are well respected and trusted by their peers
- Understand your business' processes and current software
- Are pro change
- Have strong influence within the business
- Are open and honest

Be understanding that the Project Team may have to reassign some of their current duties to other staff during the process

Internal Communication

One of the most important elements of the project will be communication across the business. You should take every opportunity you can to raise awareness of the change and drive motivation amongst employees.

There are several key points you'll need to communicate across the business:

- Why the change is needed and what the benefits of new software are
- How the change relates to the business' objectives
- Who is in the project team and why
- How other members of staff can assist in the process
- What exactly the reviewing process involves
- What the estimated timescales are for the project

The clearer you are in your communication, the less resistance you are likely to face. It is also important that senior management get involved in delivering these messages to show their support.

Communication With Suppliers

Prior to defining your requirements, it’s a good idea to decide how you will communicate them to suppliers. This will aid in creating a specific format early on and enable you to be clear and concise in your approach.

Many larger businesses choose to create an RFI (request for information) or tender document which details:

- Functionality requirements
- Business processes
- Timescales
- IT infrastructure

This might be a tad overkill for smaller businesses who may wish to produce a list of features with a scoring system instead. MoSCoW is a popular method that can be used to prioritise functionality.

M **Must have:** Non-negotiable and mandatory

S **Should have:** Important and add significant value but not vital

C **Could have:** Nice to have but will have a small impact if left out

W **Will not have:** Not a priority and provide little value

Whichever method works best for you, the most important thing is to be clear with the supplier exactly what you want from day one. This may be communicated initially via a phone conversation; however, you should make sure all correspondence is confirmed in writing.

What Are Your Requirements?

It goes without saying that you need to understand your business' requirements before you can analyse what recruitment software is and isn't fit for purpose. It can be a mammoth task but nailing your requirements is vital to the reviewing process and ensuring you end up with software suited to your needs.

Review Current Situation

First things first, you need to analyse your business and its use of your current recruitment software.

Supplier

Analysing your current supplier as a business along with its software and services will allow you to use them as a benchmark when comparing to other suppliers.

Functionality

Identifying what features in the software are being utilised will paint a clear picture of how well it is currently working for its users. It will highlight areas of the business that may use features slightly differently to others and parts of the software that are not being used to their full potential.

Internal meetings, focus groups, workshops and surveys are a few ways you can conduct this research.

- What do you like about the software?
- Are there features you use on a daily basis?
- What are your frustrations with the software?
- Do you have any workarounds?
- What features do you find useful?
- What features do you actively not use? Why?
- Do you complete all your work within the software? Do you use other applications (e.g. spreadsheets)?
- How does the software compare to what you have used previously?
- What features do you need within the software?

Services

The services your current supplier provides are just as important as the software. You will need to consider the impact they have on your users and the potential financial consequences to your business.

Technical Support

- Does their service desk operate within your core hours?
- Do they offer suitable methods of contact for your business? Can you only reach out to them via email?
- Are they quick enough at resolving your issues?
- How empathetic are they?

Training

- Do they offer a wide range of training courses?
- Do you have a point of contact to speak to about training queries?
- Can they cater for your preferred delivery method? Can they only train online?
- Do they offer free training materials? Do you have access to videos or manuals?

Customer Service

- Do you have regular contact with someone who manages your account?
- Do you feel valued as a customer?
- Do they understand your business?

Cost

Analysing the cost of your current supplier can aid you in calculating a budget for the project. You should consider any upfront costs you had with the supplier (e.g. installation, licensing and data migration) as well as ongoing subscriptions or ad-hoc fees. These will assist you later in the process when comparing your current costs, to those of a new supplier.

Company and Processes

The size of your business, how it operates and its plans for growth, can play a big part in choosing new software.

You'll need to think about:

- How many staff you currently have
- How many will need access to the software
- How many offices you have and their locations
- What industry sectors you recruit into
- What work types you cater for (e.g. permanent, contract, temporary)
- Your current and future plans to grow or diversify

Understanding the processes and multiple workflows within your business will help you identify the need for a new solution. You will ideally look at your entire structure as well as the tasks being executed in and outside of your current recruitment software.

Communicating these processes with potential suppliers will also help them understand exactly how your business operates, enabling them to tailor the demonstration to you. If they offer bespoke development, they may also be able to tailor their software to suit your processes and workflow.

You should also remember to keep an open mind when reviewing other suppliers even if you don't think their software will match your processes. It will give you an opportunity to question what you currently have in place and identify any inefficiencies which could be corrected with different software or processes.

Infrastructure

Reviewing your IT infrastructure will help identify potential issues and costs which could help build your business case for new software. It is also a crucial step in forming your requirements as not all suppliers can provide for all types of infrastructure.

If you have an IT provider or technician, they may be able to assist you with the following questions.

- Where is your data currently hosted? Is it on a server or PC within your network?
- How many devices are there in the business and what are they (e.g. desktops, monitors laptops, tablets, phones)?
- Are all your devices fit for purpose? Are they up to date with the latest software?
- What other software is used throughout the business (e.g. email, Office products, back office software)?

- What are your current internet speeds? How do devices connect (e.g. Ethernet, WiFi)? Is it reliable?
- What access do users have to data and software both during and outside of office hours?
- How much have you invested in your infrastructure to date? What are the ongoing costs (e.g. licensing, subscription, maintenance)?

Documenting the above and sharing with a potential supplier is a sure way of ensuring that the new software will work with your current infrastructure. It will also give you an idea of what may need updating in order to support the move to a new supplier.

Data

An element often overlooked at this stage of reviewing software is data. It's absolutely fundamental for any recruitment business to operate so it's essential to analyse the data you hold both in and outside of your current software.

You'll need to ask yourself:

- What data do we currently hold on companies, contacts and applicants?
- Is this data legal and do we have the necessary permission to hold it?
- How is this data being used and shared within the business (e.g. searching, placing, payroll processing)?
- How big is the data and in what format (e.g. Excel, Word, SQL in a database)?
- Where is the data held and how is it accessed?
- How much of it do we need in the new software?

Implementation

One of the biggest decisions you'll need to make when buying recruitment software is how you want it to be deployed. We're not all lucky enough to have a competent IT specialist and it can all get a tad confusing but generally, there are three methods to choose from.

Cloud

Since 2006 when Google's CEO, Eric Schmidt, coined the term 'cloud', most businesses have wanted it. But what actually is it? Cloud can be used to refer to an off-premise infrastructure, delivered as a service (IaaS). Typically, this comes in the form of a hosted server that users remote onto enabling them to access applications and data..

In recruitment, cloud is more commonly used to refer to a single piece of software that can be accessed from any location (SaaS or web-based). This generally means that the data is sitting on a supplier's server and can be accessed via a web browser meaning there is no need to install software on users' machines.

Main benefit

Access from any location with an internet connection.

Server-based

This normally refers to software that is stored on a central server, usually on the client's premise (on-premise) and the application is installed on users' machines. Users typically must be within the same network as the server for the application to retrieve the data.

Main benefit

Speed and not being reliant on an internet connection.

Hybrid

Hybrid is the latest in software access which combines the benefits of both cloud and server-based technology. It offers a unique solution whereby users have the application installed on their machine, which then allows them to access the data from any location, no matter where the data is held (i.e. cloud or on-premise).

Main benefit

Cloud and server-based benefits combined so you have access via a network when in an office or via an internet connection when on the move.

Needs Analysis

In order to conduct a thorough needs analysis, you will need to involve as many parts of the business as possible from senior leaders to resourcers. You should gather all the information you have identified and hold meetings with key stakeholders to identify what is needed from a new supplier. You might look at:

- Features and workflows the new software should have
- Processes you want the new software to cater for
- Support and training required for your business
- Integrations needed with other software you use
- The users of the software and their capacity
- Access to the software (cloud, server or hybrid)
- The data to be migrated to the new system

We mentioned the MoSCoW method earlier which will help you score the suppliers you choose to look at and help you come to your final decision.

What Suppliers Will You Look At?

You may already know which supplier(s) you want to look at. Maybe you've been influenced by someone or always see the same name popping up? Or perhaps you don't have time to look at half a dozen systems and just want whatever other agencies use, right? Wrong! It is your responsibility to ensure that the system is fit for purpose and down to your project team to find the right software for your business.

With so many suppliers to look at, finding and contacting them can be a lengthy task. A sufficient number of suppliers to review initially would be around five but depending on your requirements it may be more or less.

You can start to compile a list of suppliers by:

- Discussing what recruitment software you and your colleagues have used before
- Browsing online directories and industry forums (UK Recruiter, Recruiter, Onrec, Global Recruiter)
- Asking for recommendations or advice on LinkedIn (prepare to be swamped)
- Attending industry events such as exhibitions or award ceremonies
- Browsing comparison websites (be aware that a lot of the information on there can be false)
- Searching terms such as "recruitment software" or "recruitment CRM" on Google

No matter how you gather your list of suppliers, one way to see if they are right for you initially is by visiting their website. There should be enough information on there for you to spend 5-10 minutes getting a feel for what they can offer.

Making Contact

Now you have decided which suppliers you wish to look at and dismissed a few based on your research, it's time to make contact.

Request for Information

As part of your strategy, you may have decided to create an RFI or tender document to send to each supplier. This is a handy way of ensuring the supplier can meet your requirements prior to jumping on to a demonstration.

If you do decide to go down the RFI route then it's worth giving the suppliers a quick call to find out who to send it to. The best case scenario is that you can send it directly to the person responsible for completing it, rather than a generic email address.

Make sure you allow the suppliers time to respond with questions prior to any deadlines you have set

Contact method

You will find that most suppliers have some sort of contact form on their website for you to request information. It may be limited in detail, but most will allow you to fill in the basic information that the supplier needs to action your request.

The most useful information you can share with them includes:

- Point of contact and their details
- Company name
- Number of users
- Industry
- Current CRM

Most serious suppliers will want to arrange a time to call you and discuss your requirements prior to arranging a demo. You'll need to make sure whoever conducts this conversation from your end has all the information gathered to hand so they are ready to answer any questions the supplier may have.

Outcome

Once you have made initial contact with the suppliers, you may decide to dismiss those who don't make the cut based on their response to your requirements.

At this stage, try not to let prices get in the way of a good solution. Although cost may be an important factor for you, it's not worth discounting any suppliers on this basis, especially if there are only a handful who can meet your needs. You never know, if you build a good relationship with them, there may be room for negotiation later down the line.

Whichever way you choose to contact suppliers, it's important you confirm any specific requirements in writing to suppliers you wish to demonstrate. Detailing your requirements from the outset will make it clear to both parties what is expected of them.

How Should You Conduct Demonstrations?

Now for the fun part, demos.

Demonstrations are generally done in multiple stages and it's certainly advisable to have more than one with any suppliers you like. The key to successful demonstrations is organisation with both your time and the information you are gathering.

Here are a few things to consider when booking demonstrations:

- How many demonstrations do you plan to have (e.g. initial, shortlist, final)?
- What do you hope to cover in your initial demonstration? Subsequent demonstrations?
- Who will attend the demonstration from your side? Why?
- How, when and where will the demonstrations take place?
- Do you have the correct environment for conducting a demonstration?
- Is the supplier aware of everything you want to cover in the demonstration?

Online

Online demos involve you gaining access to a supplier's screen for them to demonstrate the software remotely. This is often used for initial demonstrations; it can help to save time and often be far more flexible. However, there are a few things to consider before the demonstration starts.

- Make sure you are familiar with the screen sharing software the supplier is using to avoid any unnecessary delays when joining
- Find a quiet room with suitable hardware which is free from distraction so you can pay full attention to the demo
- If multiple people are attending, provide the supplier with their names and job titles to improve engagement
- Ensure all attendees are aware of the outcomes and objectives of the demo and what is expected from them
- Request the demo to be recorded and sent to you to assist in your research

Face to Face

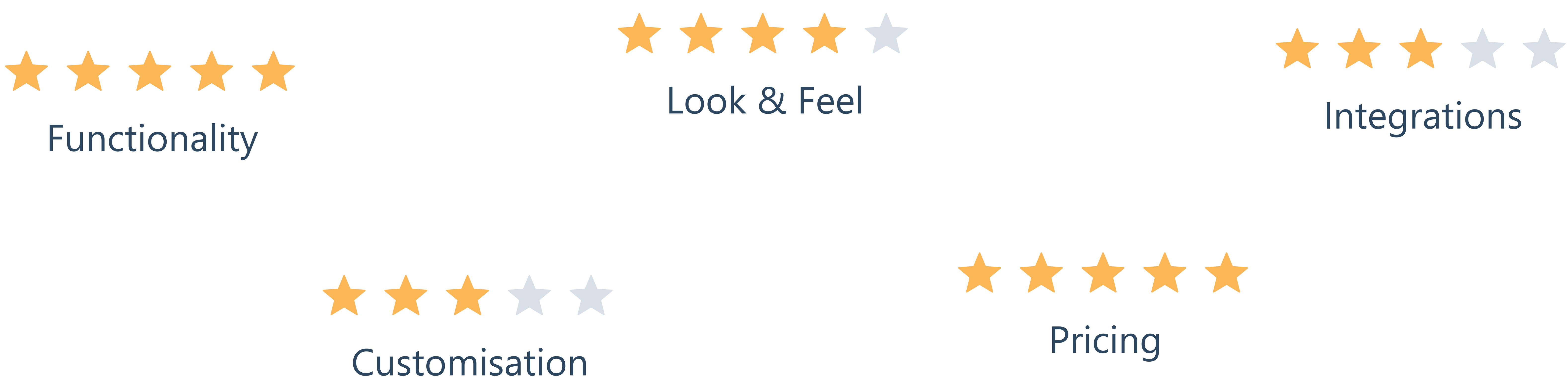
As you can probably guess, face to face demos are where you meet with the supplier for them to demonstrate the software to you. This will generally require the supplier travelling to your office and is often used at the shortlisting or final stage of demonstrations. It gives both you and the supplier the opportunity to meet face to face and discuss your requirements in more detail.

If you are arranging a face to face demo, you should:

- Secure a meeting or board room big enough for all attendees
- Ensure there is a large screen or blank wall to be projected onto
- Allow plenty of time for the meeting and if in doubt, book more than you feel is required (on average, it can take around two hours)
- Involve as many members of your project team and senior leaders as possible
- Allow the supplier to bring stakeholders from their side if they wish (e.g. trainers or project managers)
- Supply refreshments for those attending and make it as comfortable as possible

Scoring

It's important in any demonstration to have some form of scoring system. If multiple people are attending, then ensure they all have some form of document to score against. This should be in line with your needs analysis and detail various features and workflows that will be covered during the demo. You may even consider a likes and dislikes area where your attendees can detail their opinions on the software as well as the supplier.



What About Subscriptions and Cost?

After you have completed your demos, you are likely to have discounted more suppliers that are not suitable for your business. You should find that the supplier(s) you have shortlisted cover the majority of your requirements and most attendees liked what they saw in the demos. Now you know the software will be fit for purpose, it's time to start looking at the financial implications of each supplier.

Licences & Subscriptions

Very few suppliers now offer a purchase option when it comes to selling you recruitment software. Like most services you use, you will likely be expected to sign up to some form of subscription-based model. The cost will largely depend on the number of users you have in your business and what level of service you require. Some suppliers may offer different tiers of their software package so it's important you understand which tier offers the functionality and service you require.

Remember to ask each supplier whether the subscription is based on a per-user or per-seat licensing model

Per-user licensing (concurrent licensing)

This type of licensing offers unlimited flexibility when it comes to how many users can be created within the software and how many users can access the software at any given time.

For example: 50 per-user licences would mean that you can have unlimited named users, but only 50 of them would be able to access the software at any given time (concurrently).

This is generally distributed on a first come, first served basis and some suppliers will also offer you the ability to create, remove and even block user access from within the software itself. This allows your business to control your users and easily add and remove logins without the need for additional assistance or cost.

Per-seat licensing

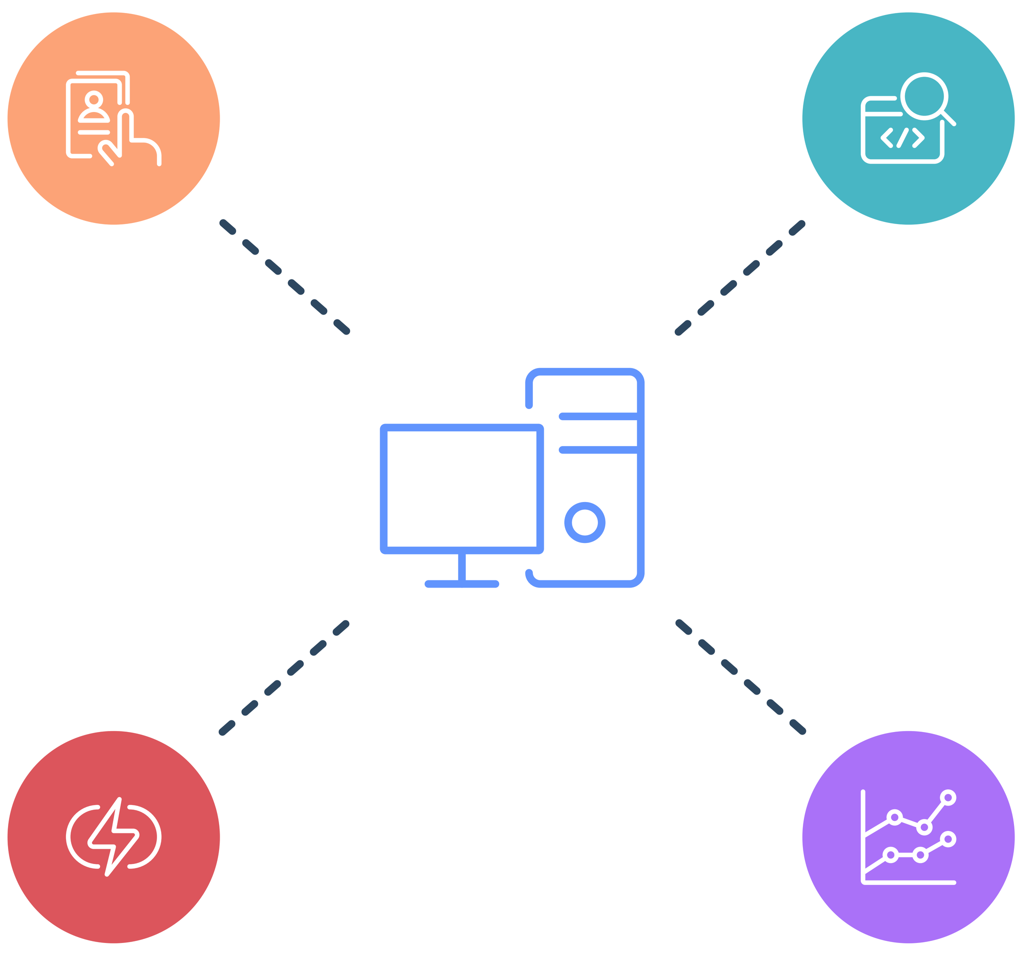
This type of licensing is far more limited than the former and will generally restrict how many logins can have access to the software.

For example: 50 per-seat licenses would mean that up to 50 individually named users can access the software.

Typically, you will not have the ability to create or remove your users and will often need to contact the supplier and pay for additional user logins.

Additional Tools

You may already use or have discussed with suppliers their partners, integrations and additional tools. There may be multiple suppliers that offer the same functionality, but in a slightly different way (e.g. job board aggregators). You should consider separate demonstrations with these suppliers to ensure that their platform or tool suits your needs. You will also need to understand any additional costs and whether they are charged directly or included with your new supplier.



Quotes

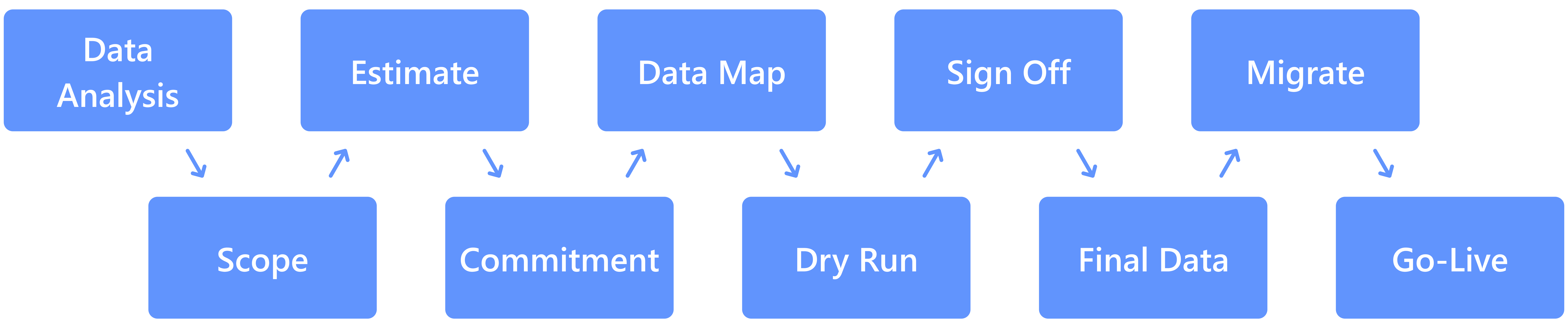
Obtaining a written quote from your shortlisted supplier(s) is crucial at this stage. It's a good time to start comparing the cost of new software compared to your current one and weighing up how much value it can add to your business.

You should consider the following:

- Do I have the right amount of subscriptions for all users?
- What type of licensing model is it?
- Is there a difference in the per-user cost if I take more or less subscriptions?
- Do the subscriptions cover technical support? If so, to what degree and are there restrictions?
- What additional tools are included as standard? What are the other costs with partners?
- Is there a cost for setting up or configuring the software?
- Do the subscriptions entitle you to regular updates?
- Is there any training included?
- Does it include any data migration costs?

Will You Need A Data Migration?

Often, the most complex part of any project is moving data from one system to the other. This tends to be referred to as a data migration or data transfer. Some smaller businesses may decide to start from scratch with a blank database and retain a copy of their old data for reference purposes. However, most businesses will need some form of data migration.



Hopefully by this stage you would have analysed the data you currently hold within your business and know what you'd like transferred to the new software. This will generally be used by the supplier as a scope for your migration. It's a good idea to send a copy of your data in a recognised format (e.g. Excel, CSV, SQL) to your shortlisted supplier(s) and ensure they are comfortable with the scope and its format.

It is common for the retrieval of data to come at a cost

Will You Need Training?

The level of training your users require will depend on the software you have chosen. For example, logical software with a friendly user interface should be intuitive enough and require less training than a more complex and overly administrative software.

With that in mind, here are a few things you may need to consider:

- How intuitive is the software to use?
- What level do users need to be trained to?
- What type of training does the supplier(s) offer?
- Is it possible to have bespoke training to match your processes?
- How can the training be delivered to staff (e.g. online, face to face)?
- Are their trainers qualified (i.e. CLDP or COLF)?
- Are there any free resources that can be utilised (e.g. manuals, videos or webinars)?
- Is there any ongoing training support or FAQs?

You will need to ensure that any training you choose is fit for purpose and covers all the learning outcomes you require.

We strongly recommend having your projects team trained early on in the project. This will give them a thorough understanding of the software and empower them to make informed decisions on the training as well as the data mapping sign off and any internal processes you may also be reviewing.

What's Your Final Decision?

By now, you should have all the information you require to decide which supplier you wish to work with. Make sure that the majority of your needs can be met by them as a company along with the products and services they provide and everything is confirmed in writing. But don't rush to tell them just yet... There are a few final steps consider.

References

Talking to the supplier's current customers is a great way of gauging their level of customer service and support. You may choose to ask the supplier to provide references or again, take to social media. What you hear may not reflect on the relationship you are about to embark on with the supplier but common themes across a wide audience will start to highlight both positives and potential negatives.

You may wish to focus your references on customers who:

- Have been migrated from the same supplier as you
- Are in the same industry sector as you
- Are similar in size and geographical location
- Have a valued opinion in the market
- Have experience with multiple suppliers in the industry
- Have been with the supplier for several years
- May have only recently adopted the new software themselves

Contracts

Contracts can often be a minefield of legal jargon. It's worth getting multiple people internally to review the contract and if possible, a legal representative for your business. This may be time consuming and costly however, it may pay dividends later down the line.

The main things to look out for and be clear on are:

- Initial Term – The length of the contract
- Notice Periods – The amount of notice you will need to give if you want to leave
- Whether the contract auto renews and for what period
- Licence restrictions (i.e. the type of licensing)
- Where your data will be held
- Any service level agreements (SLAs) the supplier offers

Payments and Terms

The last thing to consider prior to signing an order and/or contract are the payment terms. These should have been made clear on the previous quote(s), but they are certainly worth clarifying with your new supplier.

- What is the initial deposit? What does it cover? Is it refundable?
- Are there staged payments for the data migration? When are they due?
- Is there an installation or setup cost? Are there any other costs you should be made aware of?

Informing Unsuccessful Suppliers

Now the bit that no one really likes doing, rejection. If at this stage you have one successful supplier and others that have not been so successful, it's probably time you let them know. As you would expect from a client giving interview feedback on a candidate, the more detail you can provide the better. They may wish to counter your chosen supplier's offer and your objections.

What's Next?

The next steps may differ depending on your chosen supplier, however a clear project plan should be put in place which will determine key milestones including:

- Data Mapping
- Test Migration
- Bespoke Development
- Training Delivery
- Live Migration
- System Configuration
- Go Live

If you're looking at this list and thinking "Here we go again! Another lengthy and confusing process!" then don't worry because we've got your back. On our website, you can find another guide just like this one which will walk you through the whole implementation process.

Glossary

ATS (Applicant Tracking Software/System) – Software designed to manage the recruiting and hiring process.

CRM (Customer/Candidate Relationship Management) – Software designed to manage interactions with customers and prospects which helps build relationships and streamline processes.

CSV – A comma-separated values file allowing data to be saved in a tabular format which can be used to export a high volume of data.

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

Data migration – The process of selecting, preparing, extracting and transforming data and permanently transferring it from one computer system to another.

Dry run – The process of testing migrated data prior to going live.

IaaS (Infrastructure as a Service) – An instant computing infrastructure, provisioned and managed over the internet.

Job board aggregator – A website which gathers job postings from job boards and other websites and consolidates them into a single interface.

RMS (Recruitment Management System) – Software designed to manage the recruiting and hiring process.

Rolling contract – A contract that continues automatically until one party decides to end it.

SaaS (Software as a Service) – A subscription-based licensing and delivery model.

SLA (Service Level Agreement) – A commitment between a service provider and a client which defines what the client will receive and what should be expected of the service provider.

SQL – A common relational database format.

UI – User interface is the point at which human users interact with software.

UX – User experience encompasses all aspects of the end-user's interaction with software.

VMS (Vendor Management Software) – Software that enables businesses to manage and procure staffing services.

Workaround – A method for overcoming a problem or limitation in software.

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