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## 5 STEPS TO SELECTING THE RIGHT APPLICANT TRACKING SYSTEM

the  
applicantmanager

[we call it "TAM"]

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The success (or failure) of any organization is directly related to the accomplishments of its people. Thus, finding, training, and retaining quality staff is essential- no matter what size or industry. The problem is that recruiting takes time; and for many, the applicant management process is painfully manual which takes time away from other key organizational needs. People spend way too much time creating spreadsheets and managing emails instead of doing what it takes to qualify and hire.

Although it is obvious to hiring managers that the positions are needed, jobs remain unposted and unfilled, or qualified candidates are lost. No matter how important it is to make that next hire, often there just aren't enough hours to identify the right candidates and move them quickly through the recruiting process.

To streamline the applicant management process, the most competitive companies look to an Applicant Tracking System (ATS).

**So, what can an ATS do for you?** The basic functions of an ATS are to provide an employer with a single resource for recruiting that results in an organized, efficient process. With a strong infrastructure, you can improve your effectiveness for attracting and identifying quality candidates. Because the ATS automates the process of collecting and organizing applicant data, you and your team can control the recruiting process with improved outcomes.

The benefits of an ATS go beyond saving you time. With an ATS, you can improve communications between HR, hiring managers and applicants. The ATS can assist in attracting passive candidates by facilitating social media referrals, by reducing barriers to submitting an application, and by providing powerful search capabilities so that you can search through your entire talent pool. In addition, you'll have data that helps you make strategic decisions about your recruiting process.

**If you're considering the move to an ATS, how do you select the best one for you?** There are many options available with a variety of features to choose from - and at a wide range of price points. Start by understanding your needs and limitations. Remember, the best solutions offer flexibility to meet the on-going challenges of your evolving organization. Whether you're new to an ATS or if you're simply interested in looking at options, this white paper will help you look beyond the obvious so that you identify the right ATS partner. It will guide you towards making the choice that's the best fit for your organization.

## Step 1: Determine what your recruiting pain points are

It's a fact. In organizations, there are always competing priorities that require time and/or money. The first step is to determine if you're a good candidate for an ATS. Here are some simple questions:

- Is staff turnover a given?
- Do you spend more than 5 hours a week recruiting?
- Do you hire seasonally or rehire/replace applicants?
- Are you spending time chasing after OFCCP/EEO data and manually creating spreadsheets?
- Are you anticipating a significant amount of growth?
- Are needed positions going unfilled?
- Is interview scheduling and on-boarding slowing you down?
- Are you juggling job boards and manually posting positions?
- Is recruiting a nightmare of unstructured/manual processes?
- Do you want an applicant-friendly careers page on your website, but lack the IT/marketing resources to make it happen or to keep it current?
- Is it taking too long to get resumes of qualified candidates in the hands of hiring managers?
- Would a searchable database of qualified applicants be a dream come true?
- Do you and/or your team have a need to access applicant data anywhere and anytime?
- Are you having problems finding quality candidates?
- Are you finding it impossible to keep track of applicants, resumes and hiring managers?
- Do you need to be able to "do more with less"?
- Are you a one person show who needs help now?

*A strong "yes" to at least two of the questions leads you to the next step.*

Weight (1-5)	Criteria	The Applicant Manager		Sample ATS	
		Score (1-5)	Adj. Score*	Score (1-5)	Adj. Score
5	Key Features	5	25	3	15
2	Integration with Payroll	3	6	4	8
5	Cost	5	25	4	20
5	Configuration	5	25	3	15
3	User Experience	5	15	4	12
5	Customer Support	5	25	3	15
5	Implementation	5	25	3	15
3	Social Media/ Employer Brand	5	15	4	12
5	Multiple Platforms	5	25	3	15
4	References	5	20	5	20
		206	Total Weighted Score	147	Total Weighted Score

## Step 2: Use a Decision-making Framework

Regardless of whether you are the decision-maker or if you are presenting options to a decision-maker, using a framework for comparison will make the process easier. This chart shows how you can quickly compare data to arrive at a recommendation or decision.

For a full size view of this chart, please see Appendix A.

## Step 3: Consider Your Selection Criteria

Like other key purchasing decisions, it's important that the solution you select is the one that meets your specific needs. What worked for you in a previous company may not be the right solution for our current company. Wait a minute! Aren't all systems the same? They all seem to offer the same features.

### ✓ Key Features

Modern ATS's offer a common set of features. The difference is how the feature works. Here's an example. With an Outlook integration, this could mean emails are sent using your email address/company domain and the email history is automatically tracked in the ATS- very straightforward. However, outlook integration could also mean that the email is sent using the domain of your ATS and the integration could require an add-on which could lead to email slow-down. Which is the right option for you? These details matter. If the feature is mission critical, take the time to understand how the feature actually works. Why wait until after you've implemented a new system to find out that reporting doesn't meet your needs. Here's a list of the most popular features to get you started:

#### **Applicant tracking**

Easy tracking of applicants through each step of your recruiting process. What processes can be automated? How can you customize recruiting workflows? What reports will help you pinpoint bottlenecks in your process?

#### **Branded career site**

For many organizations, a branded careers page of open positions is a critical part of their recruiting strategy. How do you need your website to integrate with the ATS? Are positions automatically updated? Do you need an integrated careers page or is a standalone solution the right one?

#### **Resume parsing and searching**

Uploading resumes and conducting searches is key. How do you search for applicants? Does the system parse resumes? How can you add resumes and applicants to the system? What ways are you likely to look for applicants? By distance? Tags? Keywords? Workflow status? Skills? Keywords? Or?

#### **Calendar Integration**

Efficiently schedule interviews by sending meeting invites from the ATS and maintain a company recruiting calendar to view scheduled interviews. How is the ATS integrated with your calendar? Does the system offer real time appointment options to candidates?

#### **Automation**

Automation means you save time by eliminating manual tasks. Here are some examples: workflows, candidate emails, and more. What and how can actions be automated?

#### **Duplicate Candidate Handling**

When applicants apply for multiple positions, you need to track their history. How are duplicate candidates/applicants recognized and handled? Can repeat applicants be automatically rejected?

#### **Email and Texting**

Tracking email communications with applicants and hiring managers is key. Do emails come from your email address or a generic ATS email address. How are emails tracked and logged? How does the system integrate with your email? Gmail or Outlook or Is texting an option?

#### **OFCCP/EEO Compliance**

Federal Contractors can easily solicit required information from candidates and create mandatory reports. Is the feature compliant with OFCCP requirements? How is data collected? Who can see the data or run reports?

#### **Scalability and Multi-Company Branding**

Company growth often drives a need to support multiple brands, locations and advanced features. Does the ATS support multiple logos and company names? Does the position approval feature require login's? Other advanced features needed to save you time?

#### **System Integration**

ATS integrations include background checks, assessments, HRIS, payroll, video interviewing, reference checks, WOTC, e-verify and the list goes on. What add-ons do you need?

### Pre-screening questions

Questions asked during the initial application process can help you quickly screen applicants against minimum qualifications. Are these generic or can you customize the questions by position? How can you view the questions and answers?

### Reporting and Analysis

Data tells the story. Can you run quickly run needed reports, e.g., effectiveness of recruiting sources, time to fill, cost of hire, reasons why candidates fail? What metrics are important to your organization?

### Job Boards

For many employers, integrated job boards and automated job postings are key features. What does the integration look like? Which free and premium job boards are offered? Can you push out to internal job boards? How are applicant sources captured?

### Applicant Feedback

The need to share candidate information and solicit and capture feedback from managers and interviewers is important. For resumes, do managers have to log in or you send resumes by email? How can you collect feedback? Interview forms? Notes? Email? Ratings?

### On-line Application

For many employment applications are a must. Can you manage applications by position? Do you need DOT specific applications? What does the employment application look like after it is completed? Is the information searchable?

### On-boarding and Document Uploads

E-signature for new hire on-boarding documents. Are you limited to specific forms or can you include any and all documents for onboarding? How are documents stored? Who sets up the documents?

### User Access

Key to preserving confidentiality of applicant data, role-based security allows only authorized users to view data or perform specific tasks. What type of access do you want for hiring manager? Interviewers? Can you hide sensitive fields? Can you see who's doing what in the ATS?

### Unique Features

Some companies have special recruiting needs like seasonal hiring, DOT employment applications, mobile, panel interviews, document uploads, etc. Ask to see how the system can handle your unique needs.

Create a realistic “wish list”. If you’re new to an ATS, take a look at several systems and ask stakeholders what their pain points are significant difference in their hiring process. Ask colleagues for recommendations. What features improve the efficiency of the recruiting process? What style of user interface will your hiring managers adopt? Differentiate between must haves to address pain points vs. optional nice to haves.

### ✓ Cost

Realistically speaking, cost is a key factor for most employers. When considering an ATS, be aware of both your direct costs and indirect costs. If you have selected a cloud-based system, there will be monthly subscription cost typically based on the number of postings, the number of internal users or your organization’s headcount. There could also be package pricing. Many providers have an implementation fee that covers the initial setup of your system and initial training. If the provider doesn’t charge an implementation fee, talk to existing clients to see what type of service you can expect to receive. Is this a case of “you get what you pay for”? Make sure that the level of service fits with your organization’s needs and expectations. Are there hidden fees or tiered service options?

Additional fees associated with cloud-based systems could include premium packages, customized web pages, customized applications or configurations, training, client support, videos, automatic posting on job boards, etc. Although the fee structure may not be an important consideration for you, requesting full disclosure will allow you to budget accordingly. Find out what fee increases you can expect to see. Unfortunately, many systems will offer attractive first year pricing, but fees increase sharply by the second year. What is the fine print in the contract? Is it a month to month or annual commitment?

What indirect costs can you expect? These typically occur because of the system's complexity, difficulty in use or lack of support. Indirect costs can result in frustration because you aren't receiving prompt responses to issues, or you need to allocate additional resources or staff to accommodate for specialized training and ATS administrators.

And of course, when considering the cost, consider any savings that you might incur because you can reduce outside recruiter fees, job board posting fees, incur less overtime, or eliminate the need to hire a temporary recruiting assistant during your busy season. Talk to the ATS provider to find out what other savings you might realize by using an ATS.

## ✓ Customization and Configurations

One of the great benefits of change (including adopting new software) is that you have the opportunity to review processes and make improvements for the better. Sometimes this means that you have to make changes to your processes because the software is rigid. As an example, some ATS's require that all applicants report their EEO race and ethnic category when they apply for a job. If you're a government contractor or working under a consent decree, this makes sense. However, for other companies, there is no legal requirement to request this information from job applicants. Including this field in your company's application could trigger the perception that hiring decisions are influenced by the applicant's race. After all, why would you ask for this information if you weren't planning on using it? Because of situations like this, it is important that the ATS you choose offers choice thorough customization.

(ref: <http://www.eeoc.gov/employers/eeo1survey/faq.cfm>, [http://www.eeoc.gov/policy/docs/qanda\\_race\\_color.html](http://www.eeoc.gov/policy/docs/qanda_race_color.html))

### *TIP #1: Integrated Systems*

All-in-one's (systems that include the ATS, Payroll and HRIS) are an attractive solution.

It sounds simple; no additional contracts and of course, it's integrated, or is it really?

What data is integrated (5-7 fields) and how much time does the integration actually save? Does the ATS module offer the positive applicant experience that you want and will it improve your overall recruiting process? Everyone isn't always good at everything. Is an all in one the right compromise? Consider how the module stacks up against your selection criteria. Talk to a reference who can tell you how the integration really works.

Look for an ATS that gives you the ability to customize the tool yourself quickly and easily. You might need to ask for help on occasion, but the opportunity is there for you. This means that your recruiting processes will reflect the best practices for your company instead of following a standard process set by the software.

Here are some examples of common user customizations: pre-screening questions for different positions; role based security; recruiting workflow steps; templates, custom fields, on-line employment applications; forms, EEOC, etc. Going beyond the process, can the user experience be customized? If you have a multi-lingual staff, does the software offer simple translation of its web pages? Can users create email templates to send personal messages to applicants or are users limited to a few choices that only one person can set up?



## ✓ User Experience (UX)

In any business, a measurement of success is often whether the customer experience meets or exceeds expectations. In the case of an ATS, there is a parallel measurement relating to the user experience. Of course, we're talking about software, but there is an emotional side to using any tool, including an ATS. From an applicant's perspective, a positive user experience will support the applicant's desire to pursue employment with your company. If the tool works well, is easy to use, and feels welcoming, that experience translates to better qualified, more discriminating applicants and a tool that is loved and used by your internal users.

You want it to be relatively easy for an applicant to indicate that they are interested in a position and to submit their information to you. If an applicant is currently employed, it's unlikely that they'll complete a five-page employment application just to test the waters. What's the applicant experience on a mobile device?

How often have you purchased something and given up because it was too intimidating to setup or too complicated to figure out, or you just didn't have the time to use all of the features. From the perspective of your HR staff and hiring managers, a positive user-friendly experience means that they will make good use of the ATS. If the ATS is intuitive, easy to use, visually appealing, and makes repetitive tasks less painful and time consuming (fewer clicks), the tool will be used. This results in a recruiting process that is more efficient, welcoming, and will allow for improved communications among all participants.

## ✓ Customer Support

If the software works the way it should, you shouldn't need too much support; however, we all know that things can happen. Consider the following: Does the ATS provide support when you need it? Are support staff helpful and solution oriented? Is there an additional cost for support? Who provides customer support and where is the staff located? Are you comfortable with reaching impersonal call centers? Are support staff familiar with hiring practices and the challenges facing your industry? Have they ever actually used the ATS that they're supporting to recruit for a position? How long does it take to receive the solution or answer to your question?

### *Tip #2: Check References*

Here's an interesting way to find a reference. Go to the ATS provider's website and check out the careers pages for listed clients. If you try to apply for a listed position, is the experience what you expected?

## ✓ Implementation

Even if resources are available, a complex ATS may not be the right fit for you. Typically, more complex solutions offer bells and whistles that may be needed at large enterprises, but they are also often resource intensive and will take longer to implement (average 90 days). This could mean extra implementation support for the vast number of decisions to be made, the need for specific on-site technical support to implement, and the need to appoint "tech savvy" power users who attend specialized training to own the system.

On the other end of the spectrum are solutions that can be implemented in less than a day. They usually offer basic features to collect applicant data, but offer very few options for customization. These systems may also be tied to another system that you are using, i.e., CRM, job posting company, or resume databank that may be shared among all ATS subscribers. Typically, you can subscribe to these systems online or they come packaged with software that you are already using so implementation can be relatively quick and easy.

Of course, there are solutions in between. Just make sure that you fully understand what it will take to go live once you make your selection. Find out what resources are needed to implement the

ATS and what resources will be provided. Does the ATS provider proactively assist you in the implementation process or will you have to push the process along yourself? Is your training with live consultants or a series of generic videos? How can you import applicant data from existing systems?

“Technology is nothing. What's important is that you have a faith in people, that they're basically good and smart, and if you give them **tools**, they'll do wonderful things with them.” – Steve Jobs

### Social Media and the Employer Brand

The role of social media in recruiting is the subject of much controversy and discussion. Just do a Google search on “Social Media Recruiting” to read what people are saying. Some say that social media will replace job boards and career pages for recruiting, whereas others warn of the dangers associated with social recruiting, i.e., becoming aware of protected information about a candidate who should not be considered in the hiring process. The reality is that social networking is one of the most successful ways to find qualified candidates. Whether we reach out to friends and colleagues the old-fashioned way by speaking to someone in person or picking up the phone, or sending an email, or by using LinkedIn or Facebook, we’ve all relied on our networks as a critical part of our recruiting strategy.



What role would you like social media to play in your recruiting process? If the ATS offers social media options, consider what that really means and how it supports your employer brand. Does the ATS assist with attracting passive applicants? Are you considering the use of an ATS to leverage the strength of your employer brand and reputation?

### ✓ Platforms and Future-based Programming

Cloud based systems typically work on multiple platforms (Mac, PC, Smartphones and Tablets), but don’t assume that they all work well on all of the most popular browsers (Explorer, Chrome, Safari (Apple) and Mozilla). Unfortunately, browsers don’t all follow common programming standards, so while software may work well on one browser, there may be known issues on another. Don’t let this be a deterrent to future applicants.

Technology is in a state of constant upgrade, so it’s also important to know if your ATS providers are committed to incorporating new technology into their product and improving the user experience. What efforts are underway to be sure that the ATS does not become obsolete with its features and technology? Who is the team currently behind the system? Are they technologists, recruiters, HR experts or business investors?

### Step 4: Weight Your Criteria

Once you decide what’s important, consider weighting each criterion according to their relative importance. This means prioritizing each criteria and realistically deciding what you must have and what you’d like to have. In most cases, you’ll intuitively know if the criteria is a must have, e.g.,



budget, compliance with Federal Contractor requirements, etc. However, other criteria may require more analysis to understand the importance to your organization. What's important for one organization may not be important for another.

Look at systems integration, for example. Well integrated systems eliminate the need for duplicate data entry and minimize data entry errors. If you're looking at integrating your ATS with your HR Information or Payroll System, consider how many staff are hired in a payroll period and how much data would be moved from one system to the other. If you only hire three new staff per month and the available data to be moved consists of name, address, email, phone number and the employment application, perhaps practically speaking, integration is more of a "nice to have".

## Step 5: Check References and Test Drive the Software

Selecting the right ATS is an important decision. Interestingly enough, selection decisions are often based on the skill of the salesperson and the gloss of the product. Most ATS providers will tell prospective buyers that they have all of the bells and whistles. Because the ATS will be a key part of your success as a recruiter, go beyond the sales presentations and collateral to understand what the ATS really offers. Understand what it means when the provider says that they will provide you with support during implementation. Does this mean that they will give you a password and training documentation or will qualified staff work with you to be sure that the system is up and running the way you want it to work?

Test drive the software as an applicant to be sure that your applicants will have the experience that you want them to have. And, if possible, test-drive the software from your office to see whether it works as well as the provider's demo. Speak to references and ask them about their experience with the system. Read online reviews and testimonials to hear what your colleagues are saying about the ATS. Find out how often the system goes down and what type of issues/frustrations users have experienced. How often do they have a need for customer support and how satisfied are they with the support that they receive? How often are upgrades provided? Is the focus on client support or on sales?

## Final Steps: Making the Change

Now that you've considered your needs and your options, compare the data that you've collected. If you use a decision-making framework, the right solution is usually pretty apparent. After you've made the decision to implement, take the time to question all of the steps in your current recruiting process and incorporate best practices. This is the time to make changes. And, don't forget to let your managers and staff know when your new ATS goes live so they can be a part of your recruiting strategy.

Using the right Applicant Tracking System is a game changer. Relief from your recruiting pain points can come quickly and easily. In fact, once you use the right ATS, you'll wonder how you ever survived without it!

*About the Author:* Since acquiring her first personal computer in 1982, Edna Nakamoto, SPHR, CMC has been using technology to improve efficiency and effectiveness. She has worked in numerous HR executive roles and has worked on numerous technology projects. As an HR Consultant, and now Founder and CEO of The HR Manager/The Applicant Manager, she and her team provide business solutions using a blend of personal service and high technology for many industries. In 2017, RecruitingDaily listed Edna as one of the Women in HR Worth Watching.

## Appendix A: A Comparison of Applicant Tracking Systems

		The Applicant Manager			Sample ATS		
Weight (1-5)	Criteria	Score (1-5)	Adj. Score*	Comments	Score (1-5)	Adj. Score	Comments
5	Key Features	5	25	TAM provides all critical features, e.g., mass email, automatic open positions, etc. Also, allows collection and upload of unsolicited resumes	3	15	Many key features are available, e.g., mass email, automatic open positions, etc. Does not offer option of collecting and reviewing unsolicited resumes; calendaring feature, etc.
2	Integration with Payroll	3	6	HR can upload applicant data into payroll	4	8	Selected data available without additional data entry
5	Cost	5	25	Cost (month to month and implementation) reasonable; fees seem very stable. Good news.	4	20	Cost (1 year contract) inexpensive, but concern about future year increases.
5	Configuration	5	25	Administrators can easily configure the system on their own without the need for a technology expert, includes pre-screening questions, posting text, recruiting steps, applications and much more.	3	15	Many features can be customized, but requires support from vendor
3	User Experience	5	15	Very easy to use from all perspectives (applicants, hiring managers, HR); no barriers to submitting interest; easy navigation; applicant info all on one page; fewest number of clicks	4	12	Demo looks good, but it was a bit cumbersome to apply for a job on a client website.
5	Customer Support	5	25	Phone, email, tickets- M-F 8:30-8:30 ET; weekend emergency via email; dedicated support; fantastic user reviews	3	15	Support provided M-F 8-5 EST; email only; this could be a real challenge
5	Implementation	5	25	1 week avg TAM provides customized training and support; pretty straightforward and easy	3	15	1 month avg On line videos with generic training
3	Social Media/ Employer Brand	5	15	Linked to job boards and social media; applicants can subscribe to be notified of new positions; one click emails to maintain communications with one or many applicants	4	12	Connects to various job boards and does not provide social media connectons or pushes to job boards
5	Multiple Platforms	5	25	Passed tests conducted on Explorer, Mozilla, Chrome, Safari, and ipads.	3	15	Does not work on Chrome which is popular with applicants
4	References	5	20	Great references and user reviews	5	20	References okay
			<b>206</b>	<b>Total Weighted Score</b>		<b>147</b>	<b>Total Weighted Score</b>

For a copy of this Excel spreadsheet, please send an email to [info@thehrmanager.com](mailto:info@thehrmanager.com)