A Roadmap to a Successful Applicant Tracking Implementation.

WHITE PAPER

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the recruiter's desktop

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The recipe for Success: A proven process developed by the expert Integration Team at MaxHire Solutions Inc.

Imagine what would happen to your company's productivity if all the processes and procedures each person follows to do their job suddenly changed, all the tools you need to work suddenly don't have the right data, and nobody is quite sure how to work together anymore. It would be chaos and your productivity would plummet. Your billings would soon follow. The difference between software *installation* and software *integration* is that successful *integration* maps new software to your existing work flow. The industry standard software *installation* process simply teaches you how to use new software with little or no consideration for your current work flow. When you implement an applicant tracking system with the proper *integration* strategy and the support of an *integration* expert, you retain all your current processes, procedures, and work flow that have helped you get to where you are today. You protect your productivity.

Define goals clearly to measure success and create accountability.

When shopping for an applicant tracking system, create a list of requirements that includes both what you want to improve and what you will need to replace with the new software. Make sure you take into consideration the following when identifying your requirements:

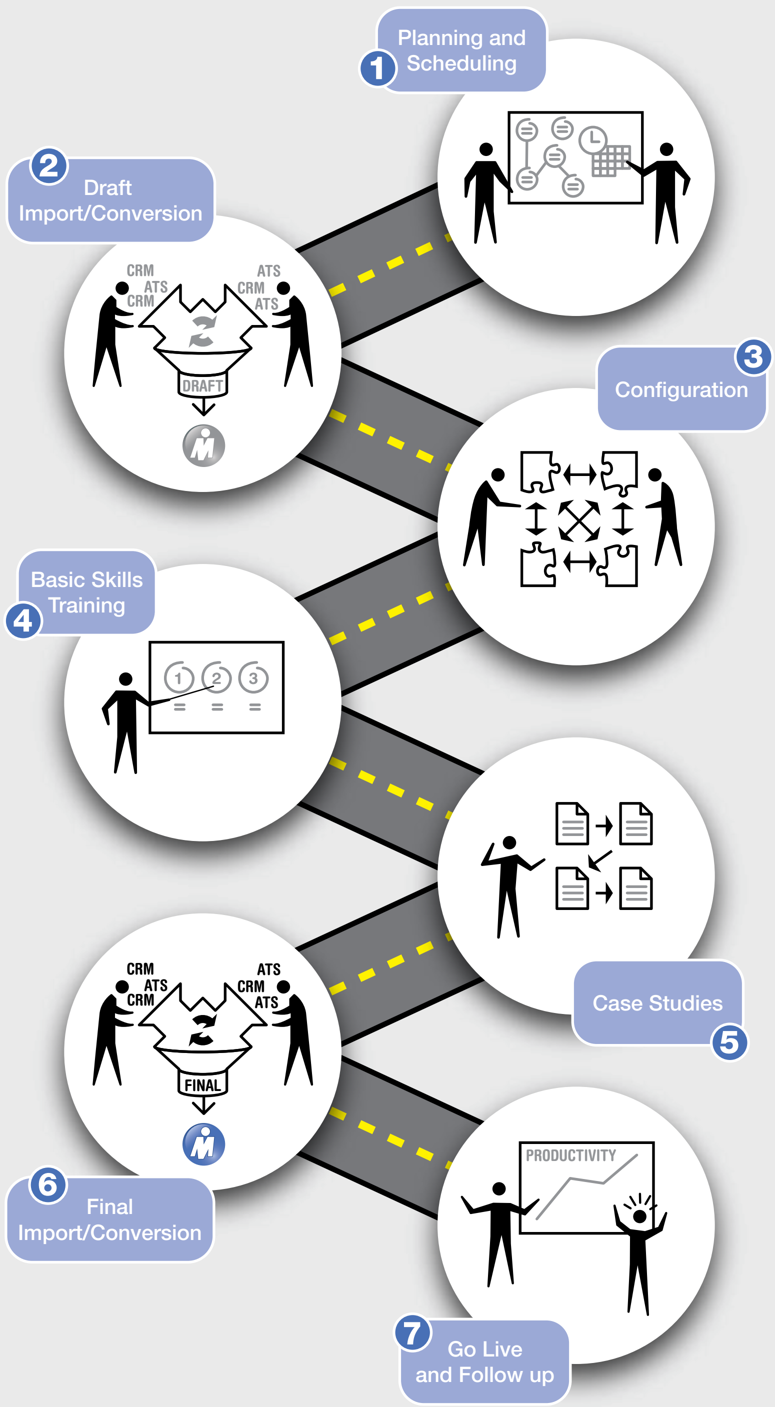
- The key features you are using in any existing software that will need to get replaced by the new system. Be specific and survey your users if necessary.
- Key reports you use to track candidates, jobs, clients, and recruiter productivity. How will these integrate with or depend upon data in the new system?
- The major areas of inefficiency in your work flow you hope to fix with the new software. These are usually the main reasons you are shopping in the first place.

Often, the glitz and glamour of what you see in product demos causes you to digress from the core requirements you originally created. After you have made your buying decision, it's time to revisit those initial requirements and not let the features of your new software determine your needs. Use your buying requirements to create a clear list of goals for your software implementation. You can easily measure the success of your implementation by whether or not you achieve each goal.

"Replace Then Improve" to minimize the risk of breaking your current work flow.

Once you have your goals in hand, separate your list of goals into 2 columns. The first column will be goals that relate to replacing or supporting the essential tools and work flow that are already in place. These are the items you must *replace* with the new software. The second column will be all the goals that reflect the ways you hope to *improve* your business and become more efficient. One of the golden rules of "Change Management" is to minimize the number of concurrent changes to create a controlled environment where the success or failure of each change can be measured independently. Look at the two columns of your list as two distinct projects. The first project will be to *replace* existing systems and processes with the new applicant tracking system. After this is complete and you are satisfied with the results, begin the process of *improving* your business. By not mixing *replace* and *improve* into one giant project, you minimize the risk of breaking your current work flow by trying to implement too many changes at once.

7 Steps to a Successful ATS Implementation



Data conversion can make or break a software implementation.

If you currently use any software to organize your candidate or client data on a daily basis, you must bring this data into your new applicant tracking system. The best way to destroy productivity is by not having the data you need to do your job. Focus on converting the main information such as contact information for key candidate and client records, activity tracking data, jobs, interviews, documents, and placements. The best way to ensure there are no surprises is to stage the data conversion.

Stage 1: *Coding and Testing*
Use a backup of your data to run test conversions as many times as needed to get the converted data mapped properly to your new system. Have users train with the 'draft' data conversion to help find any problems you missed. They also benefit from training on familiar data.

Stage 2: *Final Conversion*
After training is complete, make the final switch to your new applicant tracking system by converting a fresh backup of the data from your old system. Since you tested the conversion ahead of time, the final conversion will run quickly with no surprises and no downtime.

Document the work flow and responsibilities of each distinct job function.

The key to integrating your new applicant tracking system into your existing work flow (rather than breaking your existing work flow with your new applicant tracking system) is to map out the responsibilities and work flow of each distinct job function in your company. Your users will learn how to use the new software in the context of their existing work flow so it's essential that you map it out clearly. In more complex work flows, the "handoff" where information needs to get passed from one person to another should be well documented. People will rely on the software to facilitate passing information in a supply-chain model. An experienced integration consultant can assist with this process by leveraging tools and work flow templates gained through years of experience.

**Train people on how to do their job with the new software,
not how to use the software.**

With a solid understanding of the work flow for each distinct job function, you can begin the process of integrating your new applicant tracking system into your current work flow. Create a training curriculum for each distinct job function that focuses on how users perform their everyday tasks using the new applicant tracking system. Train each user on exactly what they need to do with the new software to support their work flow. Once all the users are comfortable with the new software, you are ready to make the switch to the new system. Avoid the temptation of introducing "neat" new features and altering your existing work flow in the process. For example, if you are not publishing your jobs on your website with your current applicant tracking system, leave this out of the initial training process. This would require modifying the way users enter job information and process candidate applications, a change that could potentially overwhelm users while they are adapting to a new applicant tracking system at the same time.

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Peter Yund, Director of Information Technology, Lucas Group

Revisit the plan at each step of the way with employees and key stakeholders.

Frequent communication while implementing the new applicant tracking system is essential. A visual map that shows each stage of the process from initial planning all the way to follow up training sessions will give users a frame of reference. At the end of your implementation process, revisit your initial goals to measure success. Go down your list of goals that relate to *replace* and ensure each of these high priority items is complete.

CASE STUDY

How Lucas Group stayed productive while implementing MaxHire following a proven Integration Roadmap.

Lucas Group, the largest privately owned recruiting firm in North America, successfully implemented MaxHire using a proven 7 step Integration Roadmap developed by the MaxHire integration team. The 7 step Roadmap includes all of the "best practices" presented in this white paper. By rigorously following MaxHire's Integration Roadmap, Lucas Group protected the productivity of their workforce and achieved the following goals on time and on budget:

- Porting data from two other large databases into one MaxHire database using several draft conversions to ensure the final conversion was accurate and fast with no downtime.
- Reprogramming existing custom reports and middleware programs to work seamlessly with the new MaxHire data just like they worked with the old systems.
- Mapping out the work flow for each distinct type of job in their organization and then training over 400 users on how to support their current job with MaxHire.
- After successfully completing the replace process, implementing work flow improvements with ongoing integration consulting from a dedicated MaxHire integration expert.

"Using MaxHire has resulted in our recruiting staff being significantly more productive. We take comfort that MaxHire is responsive and nimble enough to continually develop innovative features that translate into productivity gains for our staff."

Peter Yund, Director of Information Technology, Lucas Group

We welcome any comments and questions. Please send email to: peter@maxhire.net

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