

## Your ATS demo checklist

Use the list below to assess the ATS features, tools and responses each supplier can provide.

### Automating recruitment administration

#### Application forms and publishing jobs

- I can create a range of job templates
- I can build configurable application forms
- I can add pre-application screening questions
- I can establish legitimate interests at point of applying

#### References

- I can automate my reference request process

#### Interview management

- All panel members can use 'Interview scheduler' tool
- Candidates can self-select interview slots

#### Workflow processes

- I can tailor my org's hiring process for different roles
- I can enable a Hiring Manager or HR-led process
- Hiring Managers have access to their own portal

### Talent management

#### Talent pooling

- I can build talent pools based on skills, location & more
- I can set a data retention period in line with the DPA
- The ATS will automatically remove candidates in line with this

#### Screening

- I can use pre-screening questions to manage high volume roles
- I can create 'Job Specific Questions' for certain roles
- I can view candidates at a glance with visual screening tools

#### CV and database search

- I can accept CVs in Word, PDF and text formats
- I can use 'smart search' on CVs and application docs
- I can easily send CVs to colleagues
- I can search my database for passive talent
- I can save search terms and queries for future use

#### Employee referrals

- I can accept and manage employee referrals

### Candidate experience

#### Company careers site

- I will have a fully-branded, integrated and secure careers site
- My candidates can register for 'job alerts'
- Candidates can apply via LinkedIn or upload a CV for parsing
- Mobile-optimised forms, navigation and job search

#### Candidate portal

- My candidates can take control and track their application
- My candidates can select and release interview slots
- Candidates can notify friends about a vacancy
- Candidates can receive notifications throughout process

## ATS demo checklist continued

### Communication

#### Communications

- I can send automated, personalised emails to candidates
- I can create and edit a range of email templates
- I can automatically generate letters and contracts
- The ATS provides a full audit trail of communications

#### Candidate events

- I can create events like assessment centres or open days

#### Passive talent

- I can send content to candidates in my talent pools

#### Multi-language support

- My careers site can display in multiple languages
- The back-office can also be translated
- I can configure the ATS terminology and labelling
- The ATS can support multi-lingual or global orgs

### Managing relationships

#### Agency portal

- I can automatically notify agencies of invitation to submit
- Agency users can view status of candidate progress
- Agencies can submit candidates directly into the ATS

#### Hiring Manager and Recruiter portals

- Easy access for both Recruiter and Hiring Manager users
- I can share candidate folders with other users
- I can easily set & manage privileges and sharing options

### Data Protection

#### Data retention

- I can set my organisation's data retention period
- I can track a candidate's data retention expiry date
- The ATS automatically removes candidates once 'expired'
- Automatic renewal of candidates nearing their expiry date

#### Legal bases

- I can link to my privacy statement on application forms
- I can request consent from candidates (if required)
- I can review candidates who are 'pending' legal bases

### Reporting and analytics

#### Standard reports

- I have access to a suite of standard reports

#### Custom reporting

- I can build my own bespoke reports from scratch

#### Recruitment costs

- I can track recruitment costs against each vacancy

#### Data Visualisation

- I can transform reports into bar graphs, pie charts & more
- I can save my favourite visuals and share with colleagues

## Supporting elements

Use the questions below to assess a potential provider's approach on Information Security, pricing structures, customer care and support and more.

### Information Security

- There is a Data Protection Officer (where required) or similar role in place to manage and support Information Security
- There are clear policies in place relating to information security, from security incident reporting to password policies
- There is a full Information Security Management System in place
- I am clear on where the ATS data is stored and the supplier can provide security credentials for the hosting provider
- There is a clear procedure for reporting data leaks
- Penetration testing is available
- The supplier was able to talk me through access control and information security measures in place
- There are comprehensive back-up processes in place

### Pricing structure

- I understand the pricing structure of the supplier, including licence fees, set-up fees and any other associated costs
- The pricing tier for my organisation will support enough users/include enough functionality/cater for enough hires
- I am clear on what happens in terms of pricing if our needs change over the contract duration

### Customer care and support

- I am confident the support desk provision will meet my and my team's needs
- We have discussed particular areas of concern or complexity, and I feel confident the supplier has listened to me
- I understand what level of training is included and how ongoing training and consultancy is managed
- I understand the process for submitting support queries and what options are available to me and my team
- The supplier has clear SLAs

### Supplier's approach

- I am confident in the supplier's credentials, past experience, team knowledge and foundations of the business
- I am clear on the supplier's approach to ongoing product development and new releases
- We discussed my three key challenges and the supplier was able to provide guidance on how they could help
- We can unlock functionality or evolve our use of the ATS as our requirements and processes evolve in the future
- The supplier has explained how they work with third parties and integration partners
- The supplier is clear on their responsibilities as a Data Processor and how they can support us with our Data Controller duties
- I am clear on implementation timescales and what the process will look like for us
- The supplier can meet our proposed timescales for this project



## Choosing an ATS: What's next?

For a companion to your ATS selection project, download your full **Choosing an ATS Guide**.

We'll take you through the entire process, from initial research to getting the most from your demos.

The [Hireserve Choosing an ATS Guide](#) explores:

- ✓ How to identify your key priorities and pain points
- ✓ How to evaluate customer care and support
- ✓ Different pricing structures
- ✓ Data Protection and information security
- ✓ Questions to ask a potential provider



Choosing an ATS Guide

Once you've selected your new Applicant Tracking System, the fun doesn't stop!

It's now time for your implementation. Luckily, we're on hand to help you prepare for this process.

In the [Guide to ATS Implementation](#) you'll learn:

- ✓ The key stages of a standard ATS implementation
- ✓ The information you need to prepare ahead of your implementation
- ✓ Steps you can take to make the process better, faster and simpler
- ✓ How to avoid common delays and issues



ATS Implementation Guide