

ATS Implementation checklist

You've done your research, nailed your business case, gained buy-in from stakeholders and perhaps started your selection process.

So now it's time to think ahead to the next key stage before Go Live: the implementation of your new Applicant Tracking System (ATS). While much of the implementation process will be managed by your chosen supplier, there are a number of steps you can take within your organisation to speed up the process and make it as seamless as possible.

So, whether you have undertaken an implementation before but would like to improve on last time, or whether you've never taken on such a project and have no idea where to start, this checklist will cover everything you need to know to help ensure your ATS implementation is a resounding success. We've broken it down into stages, so you can easily review each list of actions as you work through the process. Let's go!

Project planning checklist:

Great implementation starts with strong planning. Your chosen supplier will work closely with you on this; you should be guided by dedicated implementation consultants.

Here are some of the key steps you can take at this stage:

- Identify your internal implementation team, made up of stakeholders such as HR, recruitment, IT and end users.
- Share key documentation including requirements, processes and expectations.
- Create a project plan alongside your supplier, usually during a scoping meeting, which will include core deadlines and project points for everyone to observe.
- Organise regular meetings to track project success and deliverables.

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Process checklist:

Having a clear understanding of your existing recruitment processes will be critical to the success of your implementation team. This is your chance to identify any inefficiencies within your recruitment activity and focus on simplifying and reviewing current processes.

- Review and list all your processes.
- Communicate these clearly with your implementation team and project manager.
- Collate all useful information that your supplier will require for a smooth process.
- Your supplier should provide a list to you of what they need, based around the ATS solution that you have selected, but consider anything else that would be useful for them to know.
- Be clear on reporting metrics you'll require from your new ATS.
- Speak with stakeholders and departmental heads to discuss simplifying processes and viewing of data.
- Create workflow designs to support your processes

Data checklist:

It will be your responsibility to provide accurate data to your supplier, so we recommend following these steps to ensure this happens as smoothly as possible:

- Review your data to identify any gaps or discrepancies.
- Discuss the level of detail required with your vendor.
- Obtain a template from your vendor to ensure you provide data in the correct format for upload.
- Involve your IT department around the security of sharing data.
- Prepare and send the data in-keeping with your project timeline.

User Acceptance Testing (UAT) checklist:

UAT involves thorough testing of the solution to ensure it meets all your needs and expectations and is a vital part of any implementation project.

Your new supplier will talk you through any necessary actions during the project kick-off meeting.

- Work with your supplier to create test scripts, which will allow everyone to test that the solution works as it should, based on your specific requirements.
- Dedicate the necessary time to focussing on UAT – it's a timely process but worth it as it highlights areas where configuration needs to be tweaked to suit your needs.
- Use the test scripts and your experiences to test the system, using it as you would after Go Live.
- Log any errors that you find, or anything that doesn't work the way it should.

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Training checklist:

As you move closer to Go Live, you will need to allocate time for training all the relevant people on how to use the new system.

Consider the following points:

- Identify who needs what kind of training.
- Create a training schedule to get everyone up to speed.
- Develop some 'just in time' learning, which is available for when Go Live commences.
- This could take the form of videos, user guides or checklists.

Change management checklist:

You'll no doubt already be familiar with change management, and the same process applies when implementing a new ATS.

It's therefore important to build a communication strategy that supports the change.

- Be clear on company culture and likely adoption of the new system.
- Discuss options with your implementation consultant, who will understand the challenges that companies face with adoption and solution acceptance.
- Work with leaders and employee champions to build a communications plan that matches the culture.
- Ensure you are open and honest about progress, and manage expectations.
- Build a buzz about the new solution – work with your marketing team if you need support on this.

About Hireserve

Established in 1997, Hireserve delivers intuitive and innovative applicant tracking technology.

Our award-winning support and service is what sets us apart from others in our industry, and this is echoed in our implementation process. We focus on getting to know you - your business, your processes and your team.

Even if you're not a Hireserve customer, we'd be happy to chat to you about your implementation concerns or queries.

Powerful and agile, Hireserve ATS is trusted by in-house recruiters in a diverse range of sectors and across the world, including REED, the RNLI and Buro Happold Engineering.

Hireserve creates recruitment software with a human touch.

Look us up: www.hireserve.com
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Drop us a note: info@hireserve.com

"The recruitment of the best possible staff is vital for the University's drive to continue to improve its position as one of the leading postgraduate research centres in the world. Hireserve ATS is fundamental to the University achieving this."

Jo Catterill | HR Projects Manager at Cranfield University

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