hireserve
applicant tracking solution

How to choose an ATS for Not-for-Profit organisations

Your guide to researching and selecting a new ATS: From the key questions you should ask, to how to get the most value from your demos.



Setting the scene...

The recruitment software market is thriving, with an ever-increasing range of solutions to help in-house recruitment teams to attract, engage and hire new talent. So where do you begin?

We've created this guide to help you navigate the ATS landscape and select your new system as painlessly as possible.

With years of experience in the charity and not-for-profit space, we can also bring our unique understanding of your sector's challenges and needs to your search.

In this guide, you'll discover:

- How to evaluate customer care and support
- Different pricing structures
- An insight into Data Protection and information security
- Questions to ask a potential provider How to get the most out of your demos
- A full ATS demo checklist
- What to expect from an ATS implementation

Shall we get started?

Hireserve ATS is trusted by a range of charities and not-for-profits, including:



Defining your solution

Before you start speaking to potential new providers, it is essential to define your criteria so you can enter conversations and demos with a clear idea of what you want.

Take the time to review your existing processes. Implementing a new ATS doesn't mean that you have to change everything. Some processes may still work well for you, so don't reinvent the wheel. But do identify where you want to make improvements, and ask potential suppliers how they could help during your conversations and demos.

Ask how they are currently supporting existing clients in your sector, who might share your challenges or objectives. When drawing up your criteria, try to ask a range of stakeholders to ensure you get well-rounded input. If possible, seek feedback from candidates/new hires about their experience of your recruitment process. If Hiring Managers are going to be actively involved in your recruitment process, ensure you ask them for their feedback.

Ask for a full picture - areas they think work well, the tasks or processes they find challenging, and where they would like to see changes or improvements. These conversations can be a valuable way to begin engaging key stakeholders and to start getting them excited about a new system and the possibilities it provides. Equally, however, this is an important time to balance optimism with realism. Manage expectations and be clear that a new ATS cannot transform every pain point. (Well, unless you're using Hireserve ATS that is! Sorry, we couldn't resist that one.)

After reviewing your processes and collecting feedback, draw up your requirements list. It can be useful to split this into your 'deal-breakers' and your 'nice-to-haves'.

"Hireserve has been fantastic for us to solve the whole recruitment process really, from the point of thinking about the roles we need to recruit for, right through to the point of offer."

Peter Moorcock, HR Transformation Lead

achieving for children



Customer care and support

Often, we find that when organisations have experienced a poor level of care with previous suppliers, it becomes a real priority when evaluating new systems.

We would always encourage any organisation looking for a new ATS to have customer care and a robust support provision at the top of their list. But how can you effectively and consistently evaluate a potential provider's client service offering? The checklist below should help.

Your needs:

- Do you have particular processes or requirements for which you will need particular guidance or support?
- How experienced are your team in using technology like an ATS?
- Do you have certain practices that your supplier needs to be aware of in terms of your sector, such as regulations around safeguarding or different processes for a wide range of roles?

Your potential supplier's provision:

- Is free user training included ahead of Go Live?
- What is the supplier's approach to ongoing training and consultancy?
- How can you submit a support ticket or query?
- What do your supplier's SLAs (Service Level Agreements) look like?

Action point

Ask a supplier for testimonials or references from existing not-for-profit clients about their customer care and service.

Hireserve's Support

It might be helpful to see everything we provide written down in one place, so you can then compare with other potential suppliers:

- Friendly and expert UK-based support desk, manned 09:00 -17:30 every working day, excluding UK Bank Holidays.
- Multiple support channels including telephone support and email.
- Regular Release Notes.
- Support Clinics for one-to-one advice and tailored guidance from the team.
- Regular webinars showcasing new features or topics of interest.
- Access to online Customer support and password-protected resource centre.
- Annual Account Review meeting.
- Regular Account 'check-in' calls.
- Dedicated Account Manager throughout your customer journey.
- Tailored 'handover' to support after Go Live.
- Annual 'User Group' customer conference Action point.

Pricing structures



Applicant Tracking System providers will generally base their pricing on one of the following structures:

- Cost based on number of users
- Cost based on headcount
- Cost based on 'packages' or 'tiers' of functionality
- Cost based on number of hires

Tip!

When you are reviewing potential suppliers' pricing, be sure to ask about support and customer care. Some may have different levels of customer service depending on which package you purchase, so make sure you will be fully supported.

At Hireserve, we offer three levels of support packages so you can select what works best for your organisation's needs.

Questions to ask a potential supplier

Number of Users:

- Does this include all user-types (such as Super Users/Admins/Hiring Managers, etc.)?
- What happens if the number of users is exceeded?
- How do you define different 'types' of users and their privileges or access?

Organisation headcount:

- Does this include all staff, including temporary, permanent and contract?
- Does this pricing structure include unlimited users at all levels?
- What happens if our organisation changes size significantly?

Tiers of functionality:

- How does each 'tier' impact what our team can and can't do?
- How simple is it to unlock additional functionality as our needs progress?
- What is the price vs. cost benefit of each tier?
- What if we really need a particular feature from one tier, but nothing else from that level?

Number of hires:

- Does this include all types of hire, from temporary to seasonal staff?
- What happens if there is a significant flux between rate of hires each year?

Action point

Ensure you are clear on the pricing structure and what is and isn't included.

You may want to ask some of the questions on this page, or on your comprehensive demo checklist.



Data Protection functionality

Data Protection should be a key talking point during any demos or conversations you have with suppliers.

When reviewing providers, you need to ensure your chosen ATS has the tools to support you with your Data Controller responsibilities in line with the below principles.

Personal data must be:

- Processed lawfully, fairly and in a transparent manner.
- Collected for specified, legitimate and explicit purposes, and not processed in a way incompatible with those purposes.
- Adequate, relevant and limited to what is necessary.
- Accurate and, where necessary, kept up to date. . Kept in a form which permits identification of data subjects for no longer than is necessary.
- Processed in a way that ensures appropriate security of data.

Hireserve ATS & Data Protection

Hireserve ATS provides the following functionality:

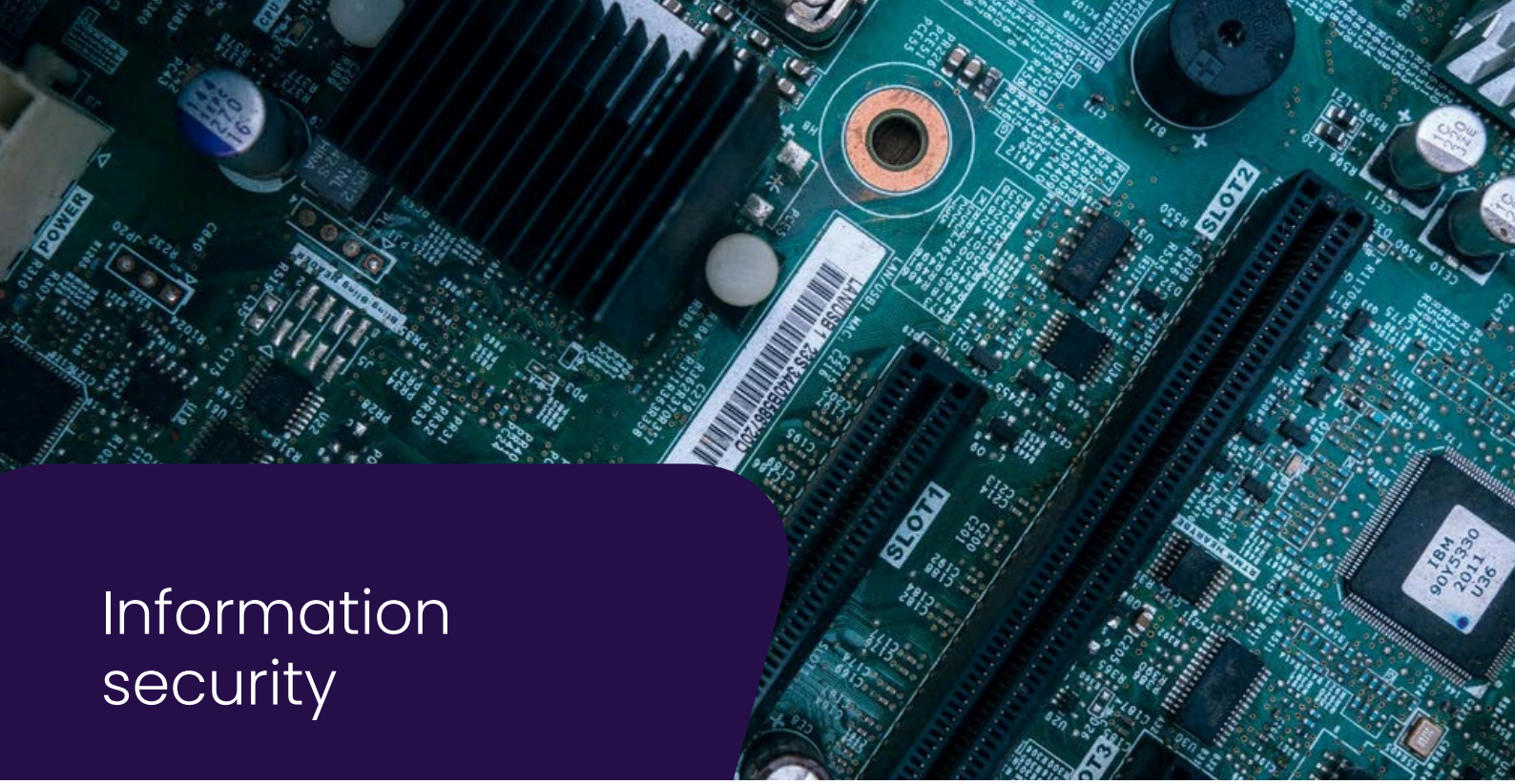
- Application methods to support your chosen legal basis (Consent or Legitimate Interests).
- The ability to set your bespoke data retention period.
- Automated renewals process when candidates are close to their data protection 'expiry date'.
- Automated removal of candidates once they have passed this date.
- Reporting tools to help you manage and audit your data protection activity and compliance work.

Action point

Leave any conversations or demos confident that a potential supplier and/or system can provide the tools you need to meet your Data Controller responsibilities.

Ask if your supplier is clear on their role as a Data Processor, and ensure they understand the key principles of the DPA, especially around data retention and legal bases.

Lastly, can they clearly talk you through their system's Data Protection functionality?



Information security

Another element of data protection is ensuring your potential suppliers (in this case, your data processors) are protecting your data effectively, responsibly and in line with their data processor responsibilities.

Ask some of the following questions to ascertain an ATS provider's approach to information security:

- Do you have a Data Protection Officer?
- What policies do you have to support your commitment to information security and data protection?
- Do you have a full Information Security Management System (ISMS) in place?
- Where is your data stored?
- What is your procedure for reporting data leaks?
- Do you undertake regular penetration testing?
- What access control and information security measures do you take?
- What back-up processes do you have in place?

A supplier should be willing to complete an information security or data protection audit or questionnaire. They should also be able to clearly talk you through the measures put in place to protect the candidate, job and organisational data they would process on your behalf.

Hireserve's approach to information security

Again, it may be useful to have a brief insight into our information security credentials and approach, so you can compare with other providers. The below covers just some of our information security provision.

Hireserve has a full Information Security Management System (ISMS) which incorporates a number of policies. We also have a robust incident reporting process, which is supported by the company's Security Incident Reporting policy.

Action point

Ask a potential supplier to complete an information security questionnaire, if your organisation has one.

Make sure to ask a supplier the questions on this page and/or on your demo checklist.



Questions to ask a potential provider

Whether this is your first ATS or your 100th, building a strong and sustainable working partnership with your ATS supplier will help you to gain more from the technology.

Here are some questions that can help you evaluate this...

Q. "What was your/the company founders' background(s) prior to setting up [Company name]?"

Ask this to understand the pedigree and foundations of a potential supplier. Now, you may not be able to have this conversation with the giants (think Oracle, IBM, SAP and so on), but for mid-sized and smaller providers, particularly those which are still founder-led, try to get a feel for the expertise and industry knowledge upon which they're built. Does a potential provider have the foundations of HR and Recruitment experience? What is the technology skill-set of the team? Was it set up by ex-recruiters, and so on?

Q. "What is your approach to ongoing development and new releases?"

This question is essential to understand how agile a potential provider and the system is. Can you expect regular updates? How responsive will a provider be to shifting trends in the industry and candidate expectations? Are they open to clients' ideas for enhancements and new features?

Q. "Can we change our processes in the future?"

You need a solution that will support you long-term and which can evolve with your needs. Say, for example, you want to change the role Hiring Managers play in the future. Can you reconfigure the set-up of the system?

Q. "[X, Y, and Z] are our key challenges. How can your solution help us address them?"

Pose a potential supplier questions around specific areas that you find challenging or are of key importance. Note how they respond - both in terms of whether their solution can help you and in terms of their approach; do they seem inventive, creative and enthusiastic about addressing your pain points?

Q. "What options are there for candidates to self-serve?"

Ask if there are ways to empower your candidates, whether through a candidate portal, self-select interview features, or more. This provides your candidates with a sense of control whilst also reducing your administration.

Q. "How have you supported other organisations in our sector/with similar challenges to us?"

Ask for case studies or examples of similar organisations to you who a potential supplier has supported. If they do not have examples in the charity or not-for-profit sector, ask for stories where they have helped organisations with similar challenges or objectives to you.

Q. "How do you work with third parties?"

For a powerful and sustainable standalone ATS, building a true recruiting ecosystem of partners and integrations is vital. This also provides a good opportunity to gauge your potential supplier's understanding of Data Protection in terms of sub-processors (who your supplier would contract to process your data on their behalf) vs. third parties with whom you would have your own contract.



How to get the most out of your demos

You've done your initial research, created a shortlist, perhaps had a few phone calls or online demos with providers, and now it's time to sit down with your preferred suppliers and have a full demo.

- Where possible, have a face-to-face demo. It means that you can get a better sense of the people behind the technology, the conversation generally flows a little better and either you or your supplier will be able to get a feel for one another's working environment.
- Ensure you go into each demo with comprehensive criteria and that you and your colleagues all have the same key points in front of them. Are you all clear on priorities, essential functionality and elements such as budget, timescales and implementation expectations?
- Consider developing a numerical scoring system to rate supplier demos, shared across your colleagues so you can all compare notes and scores consistently.
- During a demo, take into account a supplier's attitude and scope for change. Use some of the questions we suggested on the previous page to ascertain their approach to support and customer care, agility, working with integration partners and more.
- Manage expectations of a potential supplier; how long do you expect your procurement process to take? Will they be required to complete tender documentation, for example, at some stage?
- Be clear on your project timescales too. When do you want to get a system in place? In our experience, initial timeframes like these are often affected by other organisational factors, such as the procurement process taking longer than expected or lack of resource, so keep that in mind.
- Similarly, be very clear on what you're looking for. Providing a supplier with a list of key functionality, your challenges and your objectives will help them to provide you with tailored information and a really relevant demo.
- Watch out for the 'Yes' people. During the sales process, you may find team members who make promises (often with good intentions) - and then when implementation starts, they are nowhere to be found! If a supplier cannot support you in a certain area, or your timescales aren't achievable, a reputable provider should talk you though the reasons why - and their proposed alternatives.
- Be mindful of free trials. These can be useful, but it may mean that you're looking at quite a straightforward, simple system, rather than one of high configurability.

Action point

Use your demo checklist to ensure you leave your demos confident and clear that a supplier can meet your requirements and has answered your questions satisfactorily.

Your ATS demo checklist

Use the list below to compare how other ATS systems compare with Hireserve.

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 apply my own skills tags
- ✓ 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

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

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

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

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

Hiring Manager and Recruiter portals

- ✓ Easy access for both Recruiter and Hiring Manger 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'll support 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



What to expect from ATS implementation

Implementations can differ markedly depending on an organisation's requirements and timescales.

However, as a general rule, most implementations follow the process outlined on the right.

To find out more, download your ATS Implementation Checklist. Filled with practical advice and tips.



- Project Kick Off Meeting
- Requirements Documentation
- Solution Design
- Build
- Functional Testing
- User Acceptance Training (UAT)
- Training
- Data Clear Down
- Go Live!



About us

Established in 1997 and still passionate about the industry, 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 sales process and demos. We focus on getting to know you - your business, how you like to work, your challenges and objectives, and the members of your team.

We'd be delighted to chat to you about your ATS selection concerns or queries.

Powerful and agile, Hireserve ATS is trusted by in-house recruiters in a diverse range of not-for-profit organisations, including Victim Support, StepChange Debt Charity and RNLI.

Hireserve creates recruitment software with a human touch.

Look us up: hireserve.com
Give us a call: 01256 634 140
Drop us a note: info@hireserve.com

"Working with Hireserve, we knew we would be able to put our own stamp on our hiring processes."

Carol Barker | Recruitment Coordinator

StepChange Debt Charity

How to Choose an ATS for Not-for-Profit Organisations

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