

# Applicant Tracking Evaluation Worksheet



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# Selecting an Applicant Tracking System

Has the time come to begin using an applicant tracking system or switch to a new provider? Before diving in, take some time to identify your needs and evaluate possible vendors using the following worksheet. After a thorough review, you can feel more confident that you made the right decision for your business.

## Identify Your Requirements

### Review Your Hiring Process

- Document the steps, interaction, and points of frustration during the recruiting, qualification, interviewing, and hiring process.
- Determine the information you want to collect, and how you want to collect it.
- Examine the HR software programs that you are currently using, and decide if it would add value to integrate them with the applicant tracking system.

### Define Your Goals, Needs, and Wants

Ask yourself the following questions to create your list of goals, needs, and wants:

- What are my company's goals?
- What should the system improve?
- Why do I need a system?
- What is the current process lacking?
- Who needs access (e.g., executives, recruiters, hiring managers, compliance, legal, etc.)?
- How will users access the system (installed or hosted)?

### Determine a Budget

If possible, have your budget preapproved for all possible costs. The cost of an applicant tracking system can include one-time and ongoing fees. Fees can include, but are not limited to: implementation, training, configurations, customizations, consulting, installation or licenses, maintenance, and storage.

Be prepared to receive quotes from across the spectrum. Ask the vendor for firm quotes with detailed descriptions of the product and services offered.

## Evaluate Vendors

### Analyze the Product Offering and Support

- Define your priorities and rate them as H (high priority), M (medium priority), or L (low priority).
- Compare the vendor's product offering with your priorities and score them on the vendor evaluation worksheet.
- Determine the usability of the system, and its ease of training.
- Examine the level of support that is offered during implementation and after the system goes "live."

### Check References

Research independent reviews about the vendors and their products, and ask for, and follow up with, several references of companies that are similar to your company's size and needs.

# Vendor Evaluation Worksheet

**For each vendor.** During demonstrations and interviews, document responses and score each vendor on a scale from 5 (excellent) to 1 (poor) on each of your prioritized items. Next, total your ratings for each vendor to help make your comparisons.

Think of additional functions or characteristics not covered by this worksheet and use the blank rows on page 4 to list and score them.

**Vendor name** \_\_\_\_\_ **Demonstration date** \_\_\_\_\_

Vendor Characteristics	Priority	Score	Comments
<b>Stability and Reputation</b>			
How long has your company been in business?			
How long has the product been offered?			
What is your total customer base?			
What is your renewal rate?			
Is your company involved in any litigation with a customer?			
Have you received any industry awards and/or ratings?			
<b>Subtotal</b>			
Service and Support	Priority	Score	Comments
<b>Implementation</b>			
What are the requirements of implementation? (Software, hardware, technical assistance)			
What is the implementation process and what is my role?			
From contract signed to "go live," what is the average time taken to implement?			
Can your software interface with other systems (e.g., HRIS, background checking, assessments, job boards, etc.)?			
Does the training occur on site or over the Web? Is training included in the overall cost?			
<b>Subtotal</b>			
<b>Ongoing Support and Updates</b>			
What support is available once the system goes "live"?			
Explain your help and support features for recruiters, hiring managers, and system administrators.			
How are support requests handled?			
When is your next major release due?			
What is the frequency and depth of upgrades?			
What is your process for enhancement requests?			
<b>Subtotal</b>			
<b>Pricing/Flexibility</b>			
Do you offer a purchase option, or monthly subscription option?			
Is your software sold modularly or does it need to be purchased as a complete package?			
Can you add functionality as the need grows?			
How much will ongoing maintenance and upgrades cost?			
What happens if I go over the set limits?			
<b>Subtotal</b>			

System Functionality	Priority	Score	Comments
Is the system hosted or installed? If hosted, what is the uptime? If hosted, what are your security procedures?			
What are the backup procedures?			
Describe any limitations the system may have concerning number of applicants, users, documents, storage, or job openings.			
<b>Subtotal</b>			
<b>Applicant Attraction</b>			
Explain what tools are available to attract applicants and share openings on social networking sites.			
How is the career site optimized for search engines?			
Can openings be posted to job boards?			
Can applicants sign up to be notified when a new position is posted?			
<b>Subtotal</b>			
<b>Applicant Interface/Experience</b>			
Please provide a general description of the functionality available to the applicant.			
What aspects of the career search screen are configurable?			
Can applicants apply on a mobile phone, tablet, and/or computer?			
Can applicants login with a social media profile?			
What is the online application process? What proportion of the fields are mandatory?			
Are prescreening questions included? If so, can I change questions, weights and process, and create knockout questions?			
Does the system allow users to automate email communication to applicants?			
Can the applicant upload and parse a resumé into an application? If so, are applicants able to edit the results?			
How is the applicant informed on the status of the application?			
What is the process for returning applicants? Can applicants easily check the status of their application(s)?			
<b>Subtotal</b>			

System Functionality	Priority	Score	Comments
<b>Applicant Management</b>			
What applicant information is collected (e.g., contact data, sourcing information, EEO, resumé submittal, work history, education, etc.)?			
Explain how your ATS works with various job types (hourly, salary, as well as internal and external).			
Explain how your ATS tracks the source of the applicant.			
Does your system support conceptual search? What other types of search do you support?			
Does your system support Web mining and the sourcing of resúmes?			
Is the applicant workflow configurable? If so, can I create automated email messages for each step?			
Does the system allow for inserting applicant notes?			
Can I upload documents into applicant records?			
Does the system have onboarding available? If so, what prehire paperwork is included?			
<b>Subtotal</b>			
<b>Requisition Management</b>			
Can I store templates of job descriptions?			
Can an approval process be applied to the requisition? What is the process, and what rules can be applied?			
How quickly can a requisition start accepting applications?			
How do you post a requisition to job boards?			
<b>Subtotal</b>			
<b>Reporting</b>			
What reporting capabilities do you have and how long is that information accessible?			
Can data be exported into common formats (e.g., CSV) for analysis using other tools (e.g., Excel®) or systems?			
Briefly describe your applicant sourcing reports.			
Explain your reporting capabilities for OFCCP and EEO.			
<b>Subtotal</b>			
<b>Other</b>	<b>Priority</b>	<b>Score</b>	<b>Comments</b>
<b>Subtotal</b>			

# Vendor Scoring

Review your comments and rank the vendor from 5 (excellent) to 1 (poor) for each category. Tally the score for each vendor and compare their overall scores.

Category	Priority	Score	Comments
<b>Vendor Characteristics</b>			
Company stability and reputation			
<b>Service and Support</b>			
Implementation			
Ongoing support and updates			
Pricing and flexibility			
<b>System Functionality</b>			
Applicant attraction			
Applicant interface/experience			
Applicant management			
Requisition management			
Reporting			
<b>Other</b>			
<b>Total Score</b>			

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