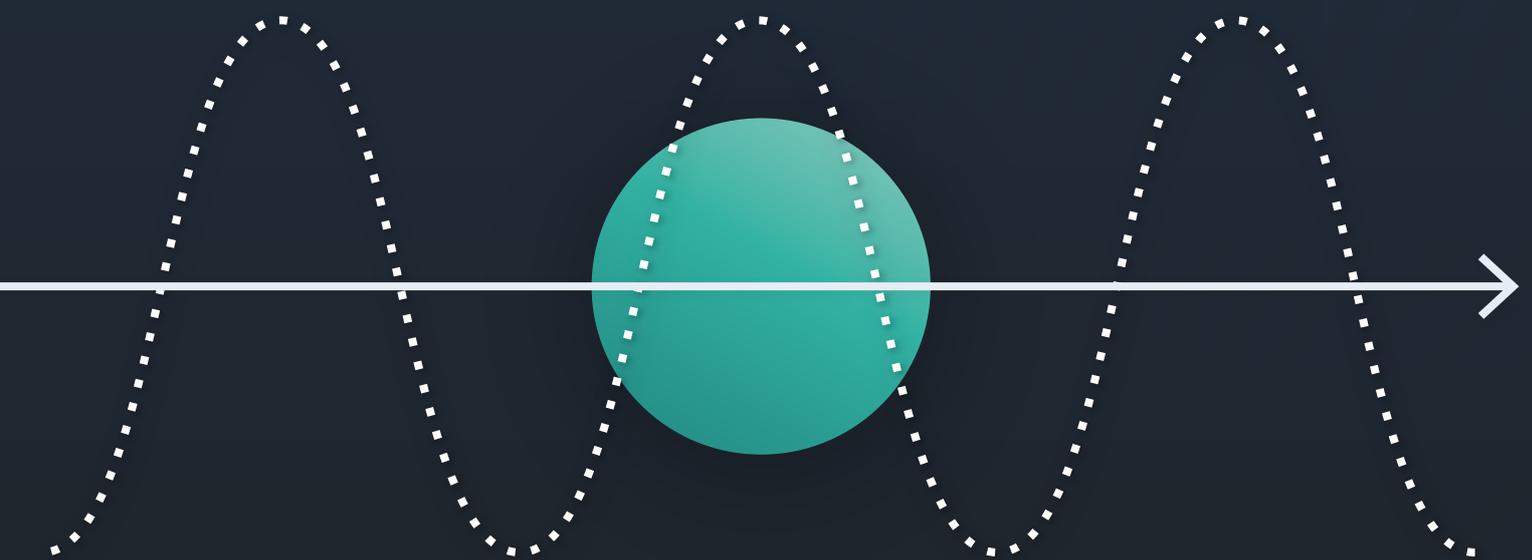


THE COMPLETE

Talent CRM Handbook



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Introduction

C-R-M stands for 'Candidate Relationship Management.'

It's a system that helps you build relationships with world-class talent. Your ATS is designed to interview applicants and process resumes, a CRM helps you engage candidates before they even think about applying. The right Talent CRM can make a big difference to your team's ability to hire world class talent, as well as helping you make a big improvements in traditional recruiting metrics like time to hire and cost of hire.

Research shows that **40% of companies are looking to purchase a Talent CRM in 2017 and have already allocated budget for it.**¹

This handbook is designed to help you establish whether you actually need a Talent CRM and how it fits in with your existing recruiting systems.

1. State of Talent Acquisition 2017 Report, Beamery



How is a Talent CRM different to your ATS?

Every part of the business has its own system of record. You keep all your HR data on your employees in your HR Information System (HRIS), and your Application and Job data in your Applicant Tracking System (ATS). What about Talent and Relationship Data? All the candidates and potential employees that have not applied? This is where a Talent CRM comes in.

Before we dive into exactly where a Talent CRM fits in though, let's iron out a few key definitions to make sure we're all on the same page.

Warning: this section contains buzzwords!

ATS

Your applicant tracking system manages the application process. It's entirely focused on managing interviews, compliance and the people that have applied.

CRM

Your candidate relationship management system manages leads (people that aren't currently applying for jobs). Leads are often passive candidates that you're talent pooling for future roles, but could also include people that you've sourced, met at careers fairs or even unsuccessful applicants you want to keep in touch with.

The ATS is job-centric—it's great for managing people that are currently applying, but doesn't help you plan for the future.

A CRM is a relationship-centric—it's a single place to manage every candidate past, present or future and is designed to help you build relationships, not just process resumes. It's a complete talent intelligence hub.

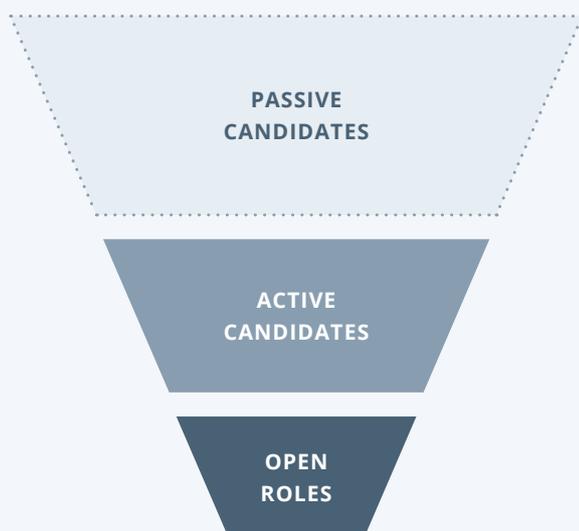
Perhaps the key distinction though is that a CRM lets companies recruit proactively.



Proactive vs. Reactive Recruiting

Traditional or 'reactive' recruiting is the practice that most companies will be familiar with. It's based around creating open roles in your ATS and then trying to fill them with active jobseekers. When these roles become urgent, companies often resort to ads and agencies to fill them faster. With every new role, the process starts again—it's entirely reactive to the needs of the business.

Proactive recruiting is different. Companies create pipelines of prospects that aren't actively looking, build relationships over time and place them in future roles. The focus is on finding talent that is a great fit for the business and engaging them ahead of business demand.



ACTIVE VS. PASSIVE CANDIDATES

ACTIVE CANDIDATES

These people are actively looking for new opportunities and are immediately available. They're the candidates that apply for jobs.

PASSIVE CANDIDATES

These people are currently employed. They're not actively looking for work, but that doesn't mean they aren't interested in moving. They may not be available immediately. They don't usually apply organically.

A proactive approach gives companies access to the entire passive talent market, provides businesses far greater visibility into where future talent is going to come from, lets them attack the and substantially improves core recruiting metrics like time-to-hire and cost-of-hire.

An overwhelming **82% of recruiters see proactive recruiting and talent pooling as major priorities in 2017.**²

2. State of Talent Acquisition 2017 Report, Beamery



Warning signs: when you know your ATS isn't a CRM

Many companies think they don't need a CRM if they have an ATS. This is largely because software sales is a highly competitive business, so many ATS vendors claim that their platforms have CRM functionality.

Here are a few simple ways to cut through the noise and work out if your ATS has any CRM capabilities:



You can't manage and engage leads

Are you able to manage leads (i.e. people that haven't applied yet) in your ATS? Leads could be candidates that your team has sourced, people you met at Careers Fairs and more. If you're still using spreadsheets or other disconnected tools to manage these people then you can be sure that you don't have a CRM.



You can't search through your database

ATS systems are full of data. Just think about the huge number of unsuccessful applicants there are whenever you post a new job. The question is, can you search through those candidates to find people that might be relevant? Many of these candidates could be relevant for other roles you have open, and you've invested a lot of resources to get these people to apply in the first place. If you can't access them effectively, you definitely don't have a CRM!



Your sourcing team doesn't use the system

Does your sourcing team live in your ATS, or do they spend their time buried in LinkedIn projects and spreadsheets? ATS systems are only really set up to manage and process applications, while sourcers deal with candidates that haven't applied yet, so if your sourcing team doesn't spend a lot of time in your ATS you can be sure it has little CRM functionality.



You have no pipeline

Do you start every new search from scratch? Or does your team have a pipeline of candidates that you can dip into to fill roles efficiently?



You can't measure engagement

Do your team have any way to see if candidates are active or engaged? Can you track relationships? If not, you have to rely on formal interactions with candidates to get any insight at all.



You need to screen resumes

Can you rate candidates without their resumes? Is your system reliant on information that candidates input themselves? If you're dependent on data that candidates give you, you certainly don't have a CRM!



Your database is largely seen as administrative

Is your data just for workflow process and compliance? The candidate information in your database can be a huge asset for sourcing and reporting, but very few ATS's help you get a decent ROI.



You have to manually input (WAY) too many required fields

Your team has to wade through required fields and forms, wasting time with manual data entry. This is hugely inefficient, and can negatively impact time-to-hire and candidate conversion (to name just a few metrics).

How do you know if you need a Talent CRM?

Talent CRMs are increasingly the sexy choice, (as far as recruiting technology can be sexy), but how do you know if you actually need one? This is by no means an exhaustive list, but it should give you an indicator as to whether you could use a CRM or not.

If the answer is 'yes' to any of the below then you might want to considering giving a CRM a whirl.



Do you actively source candidates?

The ATS is entirely reactive—you can only use it to deal with candidates that have applied. There's an obvious issue here. If you're actively sourcing candidates, you can't use your ATS.

A good CRM has got your back though. You can get proactive, target the prospects that you really want and build new relationships.



Is your team using spreadsheets to manage candidate data?

You've spent thousands on a shiny recruiting system, yet your team still resorts to Excel to manage candidates!

We've seen candidate data tracked with a variety of different tools; anything from sticky notes to Outlook tasks, but spreadsheets are probably the most popular.

Spreadsheets are great for accounting but terrible for recruiting. You have to manually update everything, you don't get any insight into candidate relationships and you have to use them in conjunction with other tools (email etc.) so you're always jumping around.





Do you have more than one recruiter?

“No man is an island.” — John Donne

Nowhere is John Donne’s popular saying truer than in recruiting. If you’re a solo recruiter, you might get away with keeping relationship details in your head and balancing a number of different recruiting tools.

If you’re part of a team though, all your candidate data needs to be accessible at all times. You need to know the status of every relationship, and if colleagues have spoken to a candidate before.

With a recruiting CRM, you and your team can seamlessly share notes, track candidates, develop and nurture leads and document activity collaboratively and transparently across your entire organization.



Do you have any hard-to-fill roles?

Certain roles will always get floods of applicants (looking at you here retail!) For many positions though, the river of applications is running dry.

If you’re hiring for leadership positions or STEM roles, your success relies on the ability to build a pipeline of candidates and nurture relationships. Posting jobs to Monster just won’t do the trick!

It’s here that the CRM comes into its own. Its very purpose is to help you build a talent pool of non-applicants that fit your Employer Brand and open roles.



Do you waste a lot of time on process and workflow?

“How we spend our days is, of course, how we spend our lives.” — Annie Dillard

Are you bogged down with data entry and process? Almost every ATS requires a LOT of love and attention to function properly. This equals a LOT of wasted time for your team.

Modern CRM systems automate the majority of the processes, ‘heavy lifting’ and admin that you waste your days on, and lets you get back to the important stuff!





Do you have a large number of candidates stored in your ATS?

How many candidates have applied to your company over the years? Thousands? More?

This data is currently rotting away in your ATS, out-of-date and unusable. There might be hundreds of candidates in there that are relevant for open roles, but the data is inaccurate so you'll never know.

The right CRM can automatically update all your ATS data and let you target the best of these previous applicants for open roles. Talk about quick wins...



Do you use careers fairs or online campaigns to generate interest?

Careers fairs and online campaigns are a great way to build your brand and attract passive candidates. The problem is that it's hard to measure ROI. It's hard to track candidates that came to your event or saw your campaign.

Too often you're unable to articulate the value of the event in the first place!

A good CRM will track attendees to your events and prospects from your campaigns automatically. It will help you nurture those fledgling relationships and give you the numbers you need to prove to your boss exactly how valuable the initiatives are!



Benefits of a Talent CRM

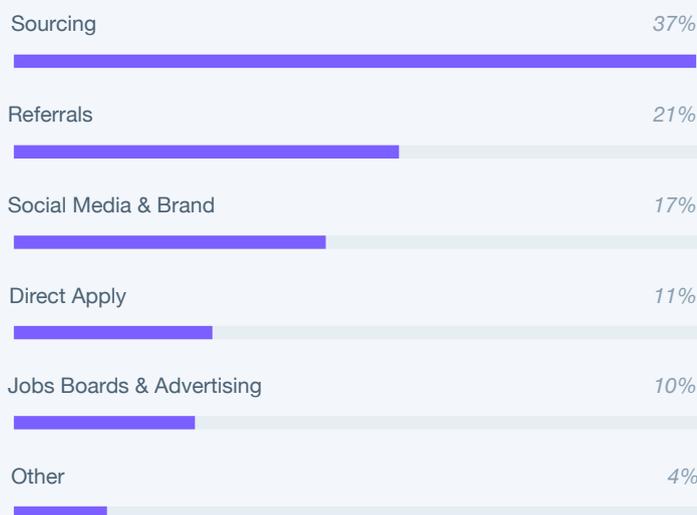
We've outlined some of the most common benefits of a Talent CRM below:



Sourcing acceleration

Sourcing is becoming an essential part of the makeup of most recruiting teams, in fact **the majority of recruiters believe sourcing will be the most effective source of hire in 2017.**³

WHAT WILL BE THE TOP SOURCES OF HIRE BE IN 2017?



While the majority of candidates (70%)⁴ are not actively looking for employment, around **55% of passive candidates would be open to hearing more about your opportunities.**⁵ This means that your team has to be proactive, finding and engaging the right talent, not just waiting for them to apply.

A Talent CRM gives sourcers a single platform to run their entire process. From direct web sourcing and talent pooling to KPI tracking and reporting, it's a system that accelerates the team and finally gives a company total visibility into their sourcing operation.

3. State of Talent Acquisition 2017 Report, Beamery

4. Why & How People Change Jobs 2015 Report, LinkedIn Talent Solutions

5. Why & How People Change Jobs 2015 Report, LinkedIn Talent Solutions





Talent Pooling & Pipelining

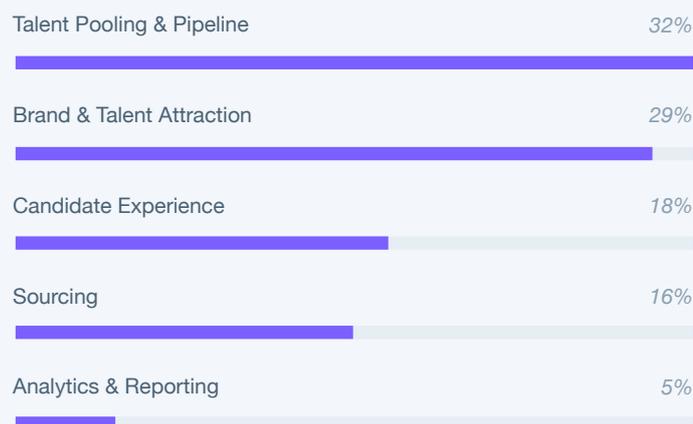
Talent pools are shortlists of candidates that are not currently being considered for a role (i.e. are not applicants).

When you think about it, this is a pretty huge number of people! Talent pools could include any of the following:

- Candidates that your team has sourced
- Leads from careers fairs or events
- Unsuccessful applicants that you'd like to re-engage
- People from diversity initiatives
- Executive or corporate searches
- And more...

When we questioned 597 talent leaders on their leading priorities for 2017, **Talent Pooling and Pipelining ranked as the top priority, with 32% of respondents⁶** referencing it as a focus area. This is easy to believe as without some kind of pipeline, companies waste significant resources starting every new search from scratch.

RECRUITING PRIORITIES FOR 2017



6. State of Talent Acquisition 2017 Report, Beamery



Talent CRM software is designed to manage every candidate, not just people that are actively looking for work, which makes it a perfect tool to use for anyone looking to build a pipeline.



Better talent Intelligence

Context is king in recruiting. Your team needs to know a significant amount of information on candidates to make fair and effective hiring decisions.

The right Talent CRM should work in the background to gather a significant amount of candidate intelligence:

- Any emails or correspondence between your team and candidates
- Up-to-date social and professional information to give you the context you need to start a conversation
- Candidate history have they applied in the past? If so, what jobs? Have your team spoken to them before?
- Closest connections: who in your team is best connected to a candidate? Can anyone give you a referral?



Powerful search

A Talent CRM is a single hub for you to store every candidate past, present or future. During implementation, your team will connect existing systems like your ATS and import spreadsheets to create a unified talent dataset.

With all your data in one place, search becomes incredibly powerful. Whenever a new role opens up, your team can search across every candidate that has ever interacted with your business to identify people that fit your requirements.

This can help your team make huge reductions in time-to-hire, and means that no searches ever have to start from scratch. You can fill roles from your database—there's no need to leave the CRM.





Increased productivity

Recruiting is a time-poor industry. Every team member is flooded with different tasks and things that simply need to ‘get done’. This workload often gets in the way of them providing a great candidate experience to every person that they speak to.

A Talent CRM lets recruiters automate manual tasks and even entire recruiting workflows. You should expect to see significant improvements in productivity. Instead of wasting time on manually updating the system you’re currently using, recruiters should get time back to focus on the important stuff—building relationships with great talent.



Collaboration

Hiring is a team game—you need a system that puts collaboration first. The right Talent CRM will make it easy for your team to share candidates and data from previous searches, as well as make notes and create tasks for each other.

Different members of your team have very different roles though, so you’ll want a system that lets you create different user classes and helps admins control access to confidential data.



Visibility & Reporting

A Talent CRM handles everything that happens before a candidate applies—this gives you a whole new reporting lens. Instead of being restricted to measuring the application, you can run reports across the entire candidate journey.

Pipeline reports and forecasts will give you visibility into future performance, and activity tracking will highlight the top performers in your team.



Choosing the right Talent CRM

So you've decided to buy a Talent CRM. Now you need to select the right solution.

Of course, we think Beamery is almost always the best solution—yes, we're biased. But here's an unbiased process you can follow to make sure that you purchase a CRM that is right for your business.

Step #1: Project goals

Write down your goals for the project. To get where you want to go, you need to write it down. Statistically, you increase your likelihood for success simply by putting your goals on paper.

Goals could include:

- More hires from direct sourcing
- Increased process efficiency
- Improved candidate engagement
- Better visibility into the pre-application process
- Optimize internal mobility
- Ability to manage passive candidates
- Improved quality of hire
- Reduced cost-of-hire
- Shorter time-to-hire

Step #2: Plan your timeline

Identify the necessary steps for a successful project. The goal here is to establish a clear timeline that you can circulate to other stakeholders.

Ask yourself, 'When do you want to...'

- Start the selection process?
- Have detailed vendor presentations and demos?
- Make your final decision?
- Start implementation?
- See first value?

We recommend that you plan for growth. No matter how carefully you evaluate your needs, they'll evolve in ways you don't expect.



Step #3: Your requirements

Identify your requirements. Remember, picking the right solution involves more than just choosing the right technology.

- Review your administrative, integration, and technical requirements. What other technologies do you have that the system will need to work with? What level of integration do you need for your ATS?
- Think about the functionality that you need today – and what you’ll want in the future.
- Go beyond technology. Which members of your team will use the system? How important is ease of use? What level of additional services, training, and support will you need?

We recommend you move beyond ‘requirements’ and look at functional, real world scenarios. What are the actual processes that you want to run initially? What about in the future?

Step #4: Create a project team

Assembling a project team to select and manage your solution is critical. This is the time to get sign-off from all stakeholders on goals, requirements and potential scenarios (i.e. Steps 1–3).

It’s important to avoid selection by committee. Typically, a voting approach doesn’t create the best decision process. While all stakeholders must accept your choice, recruiting leaders and primary users of the solution should drive the decision.

Step #5: Vendor evaluation

Evaluate potential vendors against your scenarios. You’ll select the vendor that is the best fit for your needs if you follow these recommendations:

- Vendor selection
Ask each vendor to demonstrate how they would deliver your specific processes and scenarios. (You could also ask for a trial or proof of concept to run the scenarios yourself).
- Technology evaluation.
Make sure the software covers all your administrative, integration, and technical needs.
- Look beyond the technology.
Evaluate each vendor’s ability to make you successful through access to best practices, community, consulting, support, and training.



- Ask tough questions.
The vendor shouldn't have anything to hide. Make sure the vendors actually show you they have what they say they have in terms of functionality. If you have any concerns, ask the vendor for a sandbox account. If they push back, their product is not good enough!
- It's not a feature race
Focus on the process and business actually needs (Step 3), and try not to get blinded by features that don't deliver on your business priorities
- Independent evaluation committees
While it can be helpful to set up a committee to independently evaluate potential vendors, it's important to make sure that any decision is based on whether a product meets your requirements not other factors.

Step #6: References

Find references to make sure that your vendor can actually make companies like yours successful.

- Ask your vendors for references. Solicit others from your professional and social networks to get the full picture.
- Look for references that are similar to your organization or references from companies that you aspire to become (e.g. companies with great reputations for recruiting). They'll give you a clearer idea of your chances of success.
- Don't forget to ask technical AND non-technical questions. Check the length of implementation. Find out how smoothly training went. Were any additional services required? If there were any problems during implementation, how did the vendor handle them?

Remember, the best vendors are partners in your business—make sure your questions establish whether a solution meets this criteria.

Step #7: Decision

Decision time. Choose the vendor that is most likely to help you hit your current and future goals.

Compare costs and contracts, but remember that the benefits you'll enjoy when you achieve your goals are usually much more significant. Focus on what you need to be successful.



Step #8: Implementation

You should already have a complete understanding of this part of the process, based on your initial review of the vendors. But just in case, look to:

- Integrate your new Talent CRM with your existing ATS. If there are security issues that prevent this, you should be able to import candidates directly via .csv. (Many vendors will help with data import).
- Set up fields, stages and tagging infrastructure.
- Set up user classes and permissions.
- Customize talent pools and pipelines to map to your process.
- Create relevant reports and dashboards to track success.
- Train your users in the new system.
- Get started. (Make sure you measure and share the success you're having with the software with your team and the vendor).

At this time it's especially important to make sure that all users adopt the new product. Hiring is a team game, and with everyone using a CRM your chances of success will be much higher.

Step #9: Review

Given how far ranging the possibilities are when you use a Talent CRM, there are plenty of things that could be covered at the review stage.

For simplicity's sake though, these are the most important things to do when you review the new system:

- Invest in the training and content you need to be successful. This is hugely important. You need to take responsibility for your success. A good vendor should offer one-on-one and on-demand training for your team.
- After 3–6 months, do a full review and consider re-engaging with your vendor. Evaluate additional services or products that could take you to the next level.
- Get involved in your vendor's community to learn and share best practices.
- Suggest ideas for new features that you feel are lacking. A good vendor always listens.



Questions & Considerations

It's all too easy to get blinded by attractive slides and professional sales teams. We've broken down important considerations that need to stay front of mind throughout the process, as well as the questions you should be asking at the most critical stages—discussions around implementation and your reference calls.

Important Considerations

'Easy' wins every time

You want to select a solution that's easy-to-buy, easy-to-own, and easy-to-use. Usability is crucial. If a Talent CRM is hard to use, then expect user adoption to be low.

'Power' matters

Avoid unnecessary complexity, but remember that outgrowing your solution is a negative outcome. Thinking small or cheap—without aligning to your future requirements—is likely to lead to failure. Think of the resources that you'll waste if you choose a solution now, only to replace it in 12 months time!

Ideally, your solution will let you unleash the power when you need it, but that power doesn't result in complexity that gets in the way when you just need to get something simple done and out the door. The system should help recruiters move faster and accelerate workflows across the team. You should see the first results in days. If you hear whispers that a certain product has low user adoption it's probably because of poor usability—stay clear.



Questions to ask when discussing implementation

Implementation can be a risky business. Some vendors promise the moon, but then tie you up for months in training and data import and charge you for every individual piece of work.

Here are some questions to ask vendors about their implementation process and ongoing support:

Implementation

- How long does it take to get live at a basic level? Medium? Advanced?
- Is training live or available on demand?
- Do my users need any new skills?
- Do I need to hire someone to manage this product?

Service & Support

- What's your service level agreement (SLA) for technical support?
- How do I find answers to product questions? Do you have an online community? How easy is it to access your help documentation?
- Do you provide dedicated account management?
- How regularly does your team share best practices and advice? Do you have an Academy or Content library?
- Do you handle technical integration? What does the process typically look like?
- Do you work with third parties around change management and process design, or is it handled internally?
- What third-party products integrate with your platform? Do you have a partner ecosystem? Are there any other tools you recommend?
- Are there any other ongoing costs that I should be aware of?
- Tell me about your product roadmap? Does it align with my goals? How much input do customers get into the roadmap?



Questions to ask during a reference call

To make sure you get the information you need from a reference call focus on these 3 core areas:

1. Vendor selection

- Were you the decision maker responsible for purchasing this solution?
- What made you choose the solution you selected? Why did you choose this solution over competitors?
- What were the goals of the Talent CRM project? What businesses processes were you looking to affect? Is the system helping you achieve these goals?
- Do you think the vendor can help you achieve future goals? Is it designed to help you scale?

2. Implementation & Training

- How long did it take you to learn basic functions? How long until you felt like your team had mastered advanced or more complex workflows?
- How complete is the integration with your ATS? Was it hard to set up and maintain? Could you use the software without an integration?
- How extensive was the product training? Are you happy with the on-demand materials? Are they sufficient?
- Can you tell me about your experience with implementation and support?
- Were there additional costs during implementation? Are there any hidden costs that I should be aware of in general?

3. Success

- How long have you been using the software? Which members of your team use the software the most? What is the adoption like in your recruiting team?
- Have you seen an increase in talent pipeline? Are you engaging candidates that you weren't or couldn't before?
- Have costs and time to hire been impacted? If not, do you think they will in the future?
- What's the single best thing about the system? The worst?
- If you went to another company, would you buy the same system again, or look for other options?



About Beamery

Beamery is a Candidate Relationship platform trusted by many of the world's leading brands, including Facebook, VMware, Continental International and Shop Direct. We enable companies to proactively source and engage potential candidates, build pipelines of talent, analyze performance and forecast in real time, and take action to create a great candidate experience.

We offer world class engineering, technology innovation, a customer-centric services organization, and a Software-as-a-Service (SaaS) application that is accessed by your entire recruiting team. Founded in 2012, Beamery has offices in London, Austin and San Francisco.

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