Visual Whitepaper

A Step-by-Step Guide to Choosing Your Talent CRM

54% of CRM implementations are failures,

which means you've got to bring your best judgment to the table when choosing a solution

Choosing a Talent CRM is a Journey

Companies suffer and thrive, live and die, by the collective quality of their employees; so how those employees are discovered, nurtured, and hired is of absolute importance. Having the right recruitment software in place should be at the top of every organization's priority list. Talent CRMs in particular can play a valuable role. A talent CRM can increase recruiters' productivity and improve the candidate experience and company brand. It can help foster prospect and candidate relationships and ultimately allow the business to make better hiring decisions. The best ones even help you source candidates directly from professional networking platforms like LinkedIn.

Still, a recent Gem survey revealed that *more than half* (54%) of CRM implementations are failures—which suggests that, while talent CRMs can be incredibly valuable, they're *only* valuable if you choose the right one. The best talent CRMs were built specifically to suit the workflows of recruiters. Many CRM providers offer imitations of sales or marketing automation platforms; but recruiting teams don't have the same needs as sales and marketing teams. So our *first* advice is to pass over any CRM that hasn't been built with recruiting teams in mind. From there, you'll need to review your talent team's processes, clarify your business requirements, map your feature priorities, and know what to pay attention to in product demos. Below, we'll take you through those steps.

There are many signals that
an organization might be ready for a CRM

How do You Know You Need a Talent CRM?

First things first: There's no sense investing in a CRM if you don't (yet) need one. There are many signals that an organization might be ready for one. Here are a few of them:

- There is more than one recruiter in your organization
- You're regularly searching for hard-to-fill roles (engineering, leadership, diversity hires, etc.)
- You're actively sourcing passive talent to supplement your applicant pool
- You're currently using spreadsheets, post-it notes, and other paper-based solutions to manage candidates and candidate relationships
- You have a large database of applicants or resumes that you can't tap into through search or segment into pools for nurture campaigns
- You're wasting precious hours on process and administrative work that could be automated (e.g. email follow-ups or recorded touchpoints)
- You need prospect data to be captured and stored securely
- You have compliance requirements (e.g. EEOC or GDPR)
- Your *current* CRM's functionality isn't supporting your processes (e.g. reporting isn't comprehensive enough)
- Any time you get a new req, you feel as if you are starting from scratch--without a warmed-up talent pipeline

Once you understand that you need a talent CRM, the next step is to determine the details of what you need.

STEP 1

Step 1 is to uncover

why your current system is at odds with your process

Reviewing Your Recruitment Process

Talent CRMs typically become necessary because business processes demand them. So whether you're working off of spreadsheets and post-it notes right now, or you've got a CRM that doesn't align with your workflow, step one is to uncover why your current system is at odds with your process.

Sit down with your recruiting team/s and document their process. Map out every step. What tools are they currently using to source prospects, find emails, and perform outreach? What's the step-by-step of each workflow, and how often do they perform each of these steps? How do they stay organized? How do they know if another sourcer has already reached out to a prospect? Where are they spending the most time? Where are they doing too much manual work, and possibly costing you productivity? How are they keeping in touch with prospects who aren't ready for change, but want follow-ups in the future? What does the entire candidate journey look like, from first outreach to onsite to offer to accept? How is your team keeping candidates "warm" between steps? What do your sourcers and recruiters say their biggest pain points are in these processes?

Consider your roles and your candidates as well. Are you primarily filling open positions, or are you trying to build a strong pipeline for future openings? Are your prospects active or passive? How do your passive prospects expect to be nurtured? What kind of hiring experience do they *all* expect to have with your organization?

STEP 2

Get buy-in from a range of users and stakeholders

in these discussions. It increases the likelihood of engagement after implementation.

Mapping Your Priorities / Determining Your Requirements

Now that you have a grasp of your current processes and where they could be better, it's time to establish your requirements and priorities. This exercise will ensure you don't lose sight of what's important as you move into the research and demo phases. It's easy to get distracted by bells-and-whistles and lured in by feature lists; soon enough you've forgotten why you needed a CRM to begin with... or worse, you end up implementing one that's bloated with unnecessary features your team will never use. So: What are the priorities when it comes to recruiting for your company in the next 1-3 years?

Here are some recruiting priorities we often hear, which require different CRM features:

- You need to start actively sourcing talent and building talent pools
- You need to implement diversity hiring initiatives to invigorate your business
- You need comprehensive analytics on your email outreach or your candidate pipeline
- You need to be able to search a candidate database to uncover strong candidates from previous searches
- You need a centralized database that pulls in information from elsewhere—talent events, for example

We're not suggesting these priorities are mutually exclusive; many CRMs offer many of the features needed to support them. But knowing your requirements will help you eliminate certain providers right away. Involve as many "users" as you can in this discussion, from sourcers to full-cycle recruiters to hiring managers to your Head of Talent to your CEO. (Maybe you'll have two conversations—the first with the TA team who'll be using the system; the second with other stakeholders. Those who won't have their hands in the CRM may be more responsive to the bells-and-whistles, whereas recruiters will know exactly what features are necessary.) Getting buy-in from as many people as possible will increase engagement during and after implementation.

Separating your negotiables and non-negotiables

keeps you from getting distracted by bell-and-whistle features you'll never use

STEP 2 CONTINUED

Once you've got your list, it's time to divide it into two buckets: non-negotiables and negotiables. The non-negotiables are the features that, if your recruiting team does not have access to, will prevent them from creating or sustaining the hiring processes they need. The "negotiable" bucket contains the features that would be nice to have, but that you could imagine workarounds for. Think of this second bucket as a wishlist. Maybe they're the features you won't need for another two years, and that a provider might be able to build in the meantime. Maybe they're just the features you're not entirely certain would improve your hiring process. Here's an example of what your lists might look like:

NON-NEGOTIABLES

- Integration with our ATS, email provider, events platform, and LinkedIn
- Analytics (outreach stats, activity views, pipeline analytics)
- Automatic data capture
- Email templates and bulk emailing
- Mail scheduling and sequencing
- Follow-up reminders
- Search

NEGOTIABLES / "WISH LIST"

- Job board integration
- Mobile functionality
- Career site analytics
- Landing page templates
- Candidate surveys / feedback collection
- Interview scheduling

You'll eventually want to to share these lists—especially the "must-haves"—with prospective CRM providers so that they can address how they'd meet each of your needs.

STEP 3

When working out your CRM budget, remember to

subtract the cost of things you're currently paying for that a talent CRM would allow you to dispense with

Considering Your Budget

How much you're willing to invest in a CRM will hinge on a number of factors, including how much of a priority hiring is to your organization. CRMs are typically priced per seat, so you should be clear, first of all, about who'll need access to the system. Recruiters? Hiring managers? Executives? Who will need to log in to get high-level views of your pipeline and of recruiter behavior? Who can get printed reports from your sourcers and recruiters without requiring a seat?

When working out your budget, account for the costs of the things you're currently paying for that a talent CRM would allow you to dispense with. This may include job ads, external agencies you're using for recruiting support, or the salaries of your internal TA team, whose productivity might easily double once your CRM is in place. Keep in mind that a talent CRM is likely to reduce your time to hire and cost per hire. And so on.

Putting the cost in the context of your current recruiting spend is a useful exercise—it's much easier to justify when you see reductions in cost and increases in productivity elsewhere. Ultimately, even averting a few bad hires would pay for a talent CRM many times over. (The cost of a single bad hire can be around 30% of that role's yearly salary.)

You'll use this budget to inform your selection process. Just remember that not all CRM providers are up-front about additional costs. When it's time to talk price, you'll also want to ask about:

- implementation or setup fees
- ongoing usage fees
- the cost of additional integrations you may need
- the cost of adding seats

STEP 4

During the demos, remind your team to both

hold firm to the requirements and keep an open mind

Doing the Demo Right

As you research vendors, the shortlisting process should be easy if you've identified your requirements and priorities: Any platform that *doesn't* have a feature you've deemed "essential" can go. If there are a few remaining vendors who can support all your needs, you'll need to evaluate and compare. That's when it's time for demos. As you schedule these, keep in mind who should be present for them. Recruiters should attend so you can get feedback from roles who'll be using the CRM every day. But you might include other roles in your "evaluation committee" as well. You'll want a group that, collectively, has their eyes out for every possible scenario. That's how you'll ultimately get software that's a best-fit.

As your team goes into any demo, remind them to both hold firm to the requirements you've collectively determined and keep an open mind—especially if they haven't used a platform like this before. We are creatures of habit; and it can be difficult to break people away from their established workflows, even when there's an alternative out there that will make their lives easier. Below are some of the high-level things you should be looking out for.

Sourcing

In recent years, sourcing has become one of the most important elements of the recruiting process—particularly for leadership positions and hard-to-fill roles. The best candidates for your open positions already have jobs; and you'll want a CRM that helps you source and generate outreach for these passive candidates. Is sourcing candidates directly off of LinkedIn a seamless process? Can you easily get contact information—either through the CRM itself or through an integration with an email finder? Does the CRM offer outreach analytics so you can improve your open rates, click rates, and reply rates? Can it help you see what content performs best?

QUESTIONS TO ASK PROSPECTIVE CRM PROVIDERS

- Is your CRM built specifically for recruiting teams?
- How long does implementation take?
- How long to get recruiters up to speed?
- What does customer support look like?
- Do you integrate with my ATS / email / events platform / LinkedIn?

Broadly speaking, the two biggest things to keep in mind during CRM demos are

ease-of-use for your TA team and the larger candidate experience

STEP 4 CONTINUED

Candidate management & engagement

A candidate gets uploaded into your CRM (hopefully automatically)… but what happens next? How easy is it to segment candidates into different pools for campaigns? How effective is the search feature for when you want to invite particular demographics to events? How easy is it to find former runners-up who declined your offer to reach out to again down the road? And so on. We can't stress enough how important nurture is to the candidate process. Will the CRM truly help you build a pipeline of strong relationships, so that you've got people in line when you've got roles to fill?

Reporting

If your CRM can't measure what you're doing, you'll never know what's working for your team. That said, you're likely to see some shiny dashboards out there as you demo products—which is why you should always go into a demo knowing which metrics are most important to your recruiting org. There's a lot of data out there, and not all of it will be useful for you. Can your dashboard get you the numbers you need?

Collaboration

You can't have a successful recruiting and hiring process if your team can't effectively review prospective candidates with hiring managers or see a candidate's history with your company. This kind of communication and cross-team visibility should be effortless. Look for a CRM that connects the right stakeholders with the information they need and provides each user with as much visibility as they need into a candidate's previous engagements with your hiring team.

MORE QUESTIONS TO ASK PROSPECTIVE CRM PROVIDERS

- Can I pull reports, and what kind of analytics will I have access to?
- Do you offer email outreach stats and pipeline analytics?
- Do you have templates / mail scheduling /sequencing / follow-up reminders?
- What daily tasks does your CRM automate for recruiters and talent leaders?
- How often do you release new product features?

Regardless of how many people are present for the demo, it'll be worth your while to have an agenda prepared so you can get the most out of your call. Know what needs to be asked, whom the best person is to ask it, and what objections they might need to bring up. You know your workflows and scenarios better than we do; be prepared to ask how each provider would support every possible scenario.

STEP 5

Look for providers who ask detailed information about your recruiting processes, business requirements, hiring needs, and future goals.

These are signs that the provider is trying to understand how they can best support your hiring org.

Making the Decision

Be wary of CRM providers who give you a short list of customers you can contact. At Gem, we encourage our prospective customers to reach out via their networks to *any* of our customers—not just to the first name we give them. Our users stay with us for many reasons; and it's in your best interest (and ours!) to have as many conversations as necessary to make the most informed decision. So no matter the provider you're considering, leverage your network. Find out how other teams' experiences of implementation and training were, what kind of support they've received since, and how powerful and user-friendly the platform has been for them. We particularly recommend getting reviews from businesses of a similar size, with similarly-structured TA teams, and hiring needs (and loads) that look like yours. You know what a song of praise sounds like; you also know what a red flag sounds like… so listen closely.

Hopefully, most of your team has been part of the decision-making process; but once you've signed you'll want to sit down with the TA team and prepare them for the imminent change. Ideally you'll have found a CRM that suits your workflow; but small adjustments are inevitable… and if you made the right choice, those adjustments will only be for the better. How will the CRM impact the way your team sources candidates from now on? How will their relationships to the candidate database change—in terms of navigation, search, nurture, and communication? What can/will campaigns look like now? How will this technology fundamentally change their relationships with talent?

Once your CRM is up and running? Congratulations! Dig in; get to know it; let it become second nature and the most valuable element of your workflow. Because with your newfound speed, efficiency, analytics insights, and reporting capabilities, it will be.

At Gem, we want every talent team to end up with the CRM that's right for them… but naturally, we're a bit biased. If you think your organization is ready for a talent CRM and you'd like to learn more, visit gem.com or contact us at info@gem.com.

Gem

Gem is an all-in-one recruiting platform that integrates with LinkedIn, email, and your Applicant Tracking System (ATS). We enable world-class recruiting teams to find, engage, and nurture top talent. With Gem, recruiting teams can manage candidate pipeline with predictability.

To learn more and see a demo, visit

gem.com