The Ultimate Applicant Tracking System ***Buyer's Guide***

How to Evaluate Vendors and Win Stakeholder Support

SmartRecruiters

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Introduction

At a time when two-thirds of talent acquisition leaders are being asked to cut costs,[1] purchasing a new applicant tracking system (ATS) might seem like an unattainable luxury. Yet the need for modern recruiting technology has never been greater — nor the decision so highly visible to leadership.

55%
of business leaders say that recruiting is becoming harder[2]

62%
of business leaders say their business would be more profitable if TA were optimized[3]

$25k
a single open role costs businesses nearly $25k a month in output[4]

40%
of recruiters would recommend their current recruitment technology[5]

5
on average, 5 individuals are involved in selecting new business software[6]

3x revenue 2x profit
companies that recruit well experience more revenue and profit over peers[7]

Despite tightening budgets, the good news is that judicious investment in the right ATS can help TA teams optimize costs while making the function more efficient and change-ready. That's a win-win for recruiters and the company as a whole, laying the groundwork for whatever's next.

This guide can help you navigate the complex process of buying a new ATS. From proving the ROI, to conducting requests for proposals, to making a decision, we've brought together the best step-by-step guidance, worksheets, and expert advice all in one place. Let's dive in.

[1] Josh Bersin, Talent Acquisition at a Crossroads
[2] 2024 SmartRecruiters Survey
[3] 2024 SmartRecruiters Survey
[4] Fiverr Pro, The Cost of Open Jobs
[5] Aptitude Research, Talent Acquisition Technology and the Modern Recruiter
[6] Gartner, 2024 Global Software Buying Trends
[7] Boston Consulting Group, Realizing the Value of People Management

Pre-phase Level-setting on expectations and effort

There's no sugarcoating it: Building a business case, getting buy-in, researching vendors, filling out and sending request for proposals (RFPs), choosing, and implementing a new ATS solution is hard work. Here are two steps to get ready for the effort that lies ahead.

1 Articulate the value of an upgraded ATS

While the challenges of an outdated ATS are obvious to the recruiters who use it every day, they can be less so for TA leaders and HR teams. In fact, one study found that while 78% of TA leaders are satisfied with their recruitment technology, only 48% of recruiters feel the same.

The next page offers an overview of how a new ATS can help you solve the challenges of legacy solutions.

What about HRIS recruitment modules — and their pitfalls?

While the benefits of an HRIS to the HR team are many, their recruitment modules may offer limited functionality, long implementation times, high integration fees, and high maintenance costs that leave TA teams unable to deliver a positive candidate experience or respond rapidly to changing market demands.

High-functioning talent acquisition teams need systems that are built natively for that application and offer a high level of innovation.

If you're locked in with an HRIS/HCM recruiting module, you'll want to create a long-term plan to get executive buy-in for replacing it with a best-of-breed ATS. Read more in our article What to Do if You're Locked In with an HCM Recruitment Module.

[1] Josh Bersin, Talent Acquisition at a Crossroads

ROI of a Modern Applicant Tracking System

Outdated ATS	Modern ATS	ROI of Upgrading
Difficult to Use Too much time is spent on manual tasks like re-entering candidate information, switching between systems, digging in spreadsheets, going back and forth with candidates and hiring team members to schedule interviews, chasing down candidate feedback, or preparing offers.	**Usable** Manual tasks are automated in a single, easy-to-use system. Automated hiring workflows streamline interview scheduling, collection of candidate feedback, and offer delivery. AI-based tools improve productivity by helping shortlist candidates and delivering personalized communications.	**Benefits include:** • Higher system adoption enables better data collection and process optimization • Greater recruiter efficiency through streamlined tasks • Reduced compliance • risk as data remains in the system of record • Hiring team transparency improves quality of hire and time to hire
Inflexible The system doesn't accommodate hiring process differences across roles, departments, and/or lines of business. It's overly complicated to make updates, even requiring assistance from IT or the software provider's customer service team.	**Flexible** A flexible system can accommodate unique hiring workflows across multiple groups. Admins can make configuration changes quickly, easily design new workflows, modify user permissions, and stay on top of compliance requirements.	**Benefits include:** • Customizable processes promote efficiency • Ease of changing configurations lowers IT overhead and reduces compliance risk • Scalability to adapt to evolving global and local requirements and ongoing organizational changes (e.g., M&A)
Siloed Recruiters need to switch between tools and dashboards because there is no way to share data between systems, adding to the number of manual steps in workflows, where mistakes can occur due to human errors.	**Connected** CRM, calendaring systems, sourcing tools, assessments, background checks all accessible in one, compliant system. HCM connections ensure job reqs flow into the system and new hire data flows out.	**Benefits include:** • Greater recruiter efficiency from reduced context switching • Improved data visibility and compliance • Greater business agility • Lower total cost of ownership

2 Prepare for the ATS search process

Like most business software purchases, the ATS buyer's journey is a multifaceted and highly collaborative process. There are five main phases, each one spanning approximately one month or more, though timelines can be compressed for change-ready companies. Because each phase touches on multiple roles and functions, identifying stakeholders and enlisting their support is key.

Here's a high-level overview of the ATS search process and what gets accomplished at each stage.

Phase I	Phase II	Phase III	Phase IV	Phase V
Defining your needs	Proving the ROI	Shortlisting vendors	Sending RFPs	Making a decision
Months 1 - 3			Months 4 - 6	

Pre-search Success Checklist

The more prepared you are heading into the ATS buying process, the smoother it will go. While it's impossible to anticipate every objection, roadblock, or disruption that may come up, you can avoid common pitfalls by addressing these key considerations before starting your ATS search.

- [ ] ***Identify*** **Stakeholders**

Identify 1-5 decision-makers from Talent Acquisition, Employer Branding (if applicable) Finance, HR, and/or IT (including digital transformation leaders, if applicable) who will sign off on the new ATS. You don't need to make contact yet, as that comes later on, but you know who they are and how to best collaborate with them.

Roles may include HR Leaders, TA Leaders, Finance Leaders, Business Partners, HRIT Managers, Procurement Managers, or Legal Counsel.

- [ ] ***Enlist*** **champions**

Shortlist 1-3 influential drivers within your company who will advise, guide, and advocate for the new ATS. You may have already vetted their interest in the initiative or know that they're the right people for the job.

Roles may include CEO, CFO, and Head of Talent.

- [ ] ***Secure*** **budget**

Make sure there is money to invest in a new ATS. You may know how much based on current spending or a conversation with your function's leadership. You don't need to have an exact figure at this time, but you do need confirmation that there's a budget bookmarked for this purpose.

See the TCO estimator for help calculating your budget considerations.

- [ ] ***Align*** **business goals**

You understand TA's potential for impact on furthering specific business goals or KPIs (key performance indicators). You can draw a clear line on recruiting, reducing costs, and workforce planning with these objectives.

See Worksheet C for inspiration.

Phase I
Defining Your Needs

Your search for a new ATS begins with Phase I, a dedicated discovery period for unearthing current pain points and identifying future opportunities. Although time-intensive, this exploratory stage will yield valuable insights into your organization's needs and help you choose the right solution.

STEP 1		STEP 2		OUTPUT
Analyze current recruitment process	→	Calculate budget & timeline	→	Evaluation Criteria

Timeline: ~4 weeks

Required Roles:

Recruiter | Hiring Manager | TA Leader | Candidate Experience Representative | HRIT

STEP 1:
Analyze your current recruitment process

To see where older technology is hurting your recruitment process, compare current pain points with desired capabilities with the worksheets linked below. From there, you can rank these functionalities and improvements in priority order to clarify objectives with a new ATS.

- [ ] ***Uncover*** **hiring pain points and** ***identify*** **desired improvements**

  View Worksheet A for a list of criteria for Hiring Success that impact your TA team's operations. Evaluate responses from multiple parties to develop a comprehensive plan for your ATS upgrade.

- [ ] ***Prioritize*** **desired features and functionalities**

  Use the scorecard in Worksheet B to rate your current system and understand which areas are most important for you to improve.

- [ ] ***Bring in*** **the user team**

  It's important to do the above exercises through the lens of your own role, as well as all core ATS user types. Recruiters may be the ones who spend the most time using a recruitment solution, but your new ATS must also serve hiring managers, candidates, TA leaders, and HRIT.

  Don't assume you know each user type's pain points and frustrations.

- [ ] ***Gather in input*** **from the internal team**

  Use 1-1 interviews, small focus groups, or online surveys for each role type. Input from these interviews will give you qualitative data to back up or challenge assumptions so you can find a solution that everyone enjoys.

What do people want from an ATS?

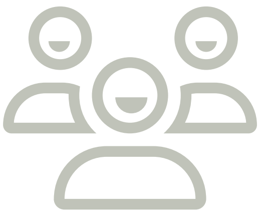
Recruiters

- Ease-of-use
- Sourcing analytics
- Engagement
- Flexibility and tools
- Automated processes

Hiring Managers

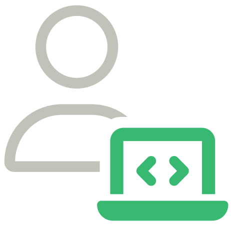
- Ease-of-use
- Candidate profiles
- Scheduling flexibility
- Communication

Candidates



- Ease-of-use
- Personalized communication
- Transparent updates
- Mobile experiences
- Quick offers with digital signature

HRIT



- Connectivity
- Compliance features
- Low maintenance effort
- Effortless integrations with internal HR stack and third-party solutions

What makes an ATS outdated?

While there are many reasons why an ATS becomes outdated, remaining process-centric versus becoming candidate-centric is often the cause. When new functionalities get bolted onto legacy solutions (instead of being developed as an integrated tool), the user experience (UX) suffers. This technical debt adds up over time, impacting functionality and integrations.

STEP 2:
Understand Timeline & Budget Considerations

Now that you have a better idea of which features and capabilities you want in a new ATS, you might be wondering just how long it will take to get them. The answer depends on two key considerations — when the contract for your current ATS expires and your expected budget.

The ***Timeline Calculator*** below offers a quick equation to understand how long it will take to go live with a new ATS. You'll need the contract expiration date to fill it in.

The ***Total Cost of Ownership*** calculator can help you estimate roughly how much budget you will have for a new ATS based on your current spend.

Be sure to include buffers in your timeline to account for unforeseen events and long approval times that can slow things down.

ATS Search Timeline Calculator

Current contract end date – 3-8 months – 6 months – 1 month = ATS Search Process Start Date

- 3-8 months: Average implementation time*
- 6 months: Average ATS search time
- 1 month: Safety buffer

Implementation times vary based on the size of the company and the complexity of business needs. Times can range from 1 month for a small company with simple needs to 12 months for a global firm with multiple brands, job types, languages, and custom API integrations.

Total Cost of Ownership (TCO) estimator for current ATS

Platform Costs[1] + Integration Fees[2] + Ongoing Costs[3] = Total Cost of Ownership (TCO)

[1] Annual licensing fees, which are typically based on user seats for the core product and any add-ons.
Can be found in the original contract or renewals.
[2] Charges to integrate third-party solutions such as sourcing tools, assessments, and background checks.
Can be found in the original contract or renewals.
[3] Maintenance, management, and support costs, including any specialized help such as IT or Dev support.
Can be found in TA budget reports.

Phase II
Proving the ROI

Investing in new technology always has a hard cost and while the gains from an ATS upgrade can be immense, they're also hard to quantify. Phase II of your ATS search is where you'll prove the return on investment (ROI) of upgrading solutions and build a business case to back it up.

STEP 1	STEP 2	STEP 3	OUTPUT
Build a strong case for change →	Invite champions into process →	Streamline stakeholder management →	Stakeholder Pitch

Timeline: ~3 weeks

Required Roles:
Recruiter | TA Leader | CFO

STEP 1:
Build a strong business case for change

Success with a new ATS depends on your ability to bring in effective champions from the start. To win decision-makers over, you need to articulate the business case with confidence.

- [ ] ***Conduct*** an efficiency comparison

  Use Worksheet C to compare the efficiency benefits of a modern ATS with your current system.

- [ ] ***Prepare*** for objections regarding HRIS modules (if applicable)

  HRIS modules can set talent teams back. Worksheet D offers a handy reference for objection handling.

Why get buy-in before contacting vendors?

Just because your company currently uses an ATS doesn't mean the prospect of purchasing a new one is palatable to senior leadership. Competing priorities across functions means potentially many tools and systems are up for renewal and/or an upgrade.

Save yourself the headache of falling in love with an ATS you can't have by doing this work early in the process.

As you make your way through these exercises, you'll find that not every talking point will be compelling to every stakeholder. That's intentional; filling in the worksheets will make it much easier to customize presentations for different stakeholders.

"*TA teams need to be empowered* to speak numbers with the CFO, argue against the HCM module with the CHRO, and explain the technical benefits of a best-of-breed solution with a CTO."

Dennis Böcker
VP EMEA Central
SmartRecruiters

Remember, the most persuasive people are effective storytellers. A strong business case will connect with your audience on things they care about, such as the professional and personal values outlined below, while showing them how a new ATS will assist in achieving their goals. As you think about each stakeholder, consider which values will connect most strongly with them, and shape your story to match their concerns.

B2B Software Value Drivers

- [ ] ***Articulate*** stakeholder needs

Worksheet E offers a role-based alignment checklist that breaks down recruiting and non-recruiting stakeholders and the priorities that matter most to them.

Examples of Personal Values

- Reputational assurance
- Design & aesthetics
- Growth & development
- Reduced anxiety

Examples of Professional Values

- Time savings
- Decreased hassle
- Transparency
- Integration
- Risk reduction
- Scalability
- Cost reduction
- Reduced effort
- Information
- Availability
- Simplification
- Flexibility
- Innovation
- Compliance

Source: Harvard Business Review

STEP 2:
Engage decision-makers

Now that you have a compelling story taking shape, it's time to tailor it to your audiences. Whether increased efficiency for IT managers, cost savings for the CFO, or change-readiness for HR leadership, it's important to highlight specific value propositions for each decision-maker.

- [ ] ***Map out*** values by persona

Worksheet F offers a framework for mapping relevant values to personas (e.g. CFO, CHRO, CTO). As you fill in the fields, you'll start to see a persuasive story emerging on why a new ATS is worth the investment and how it will enhance their spheres of influence.

STEP 3:
Define resource needs and enlist stakeholders

After an ATS is purchased, its implementation will require an investment in internal resources. The project's success depends upon stakeholder buy-in for every party involved — not just executive sponsors — so it's important to enlist their support up front.

The following table offers a high-level list of roles and responsibilities for implementation in partnership with the vendor team.

Role	Responsibility	Time Requirement During Implementation Phase*
Project Sponsor	Oversight and escalation support.	5 - 10%
Project Manager	Project management, status reporting, and risk mitigation.	45 - 50%
Core Team and System Administrators	Main points of contact for configuration decisions.	50 - 60%
Functional SMEs	Input to the core team per functional expertise and/or region (e.g. hiring process, legal, employer branding).	15 - 45% depending on function
HRIT Specialists	Integration, data migration, reporting SMEs (e.g., calendar, SSO, HRIS, career site, data warehouse, third party tools).	10 - 15%

*Time requirements will vary depending on the scope and complexity of the project.
These figures are a general guideline and you should consult your preferred vendor for accurate requirements.

> “When you understand how other leaders across the business are measured for success, ***you start to change the narrative on things they care about.***”

Jared Best
Vice President - Customer Technology
Cielo Talent

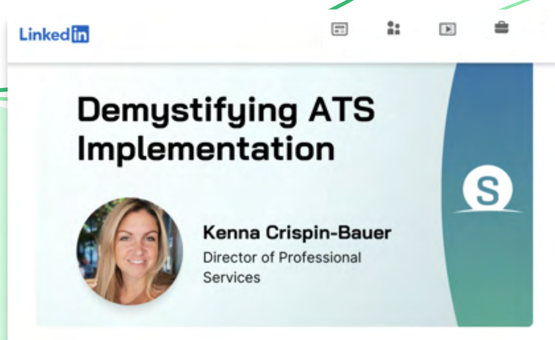
Understand stakeholder buy-in

Worksheet G offers a matrix to categorize your project stakeholders with tips for managing them. As you navigate the stakeholder landscape, remember to focus on the overall benefits of the new system and bring your conversation back to their personal and professional values. Once you’ve completed the above steps, you’ll be ready to make the case for the ATS investment.

Tailor your presentation

Put it all together in a tailored presentation for each stakeholder group that demonstrates **alignment with broader department and company goals**. You can lean on potential vendors for help later in the ATS purchase process when pitching specific solutions.

To learn the five keys to a successful implementation, read our article ***“Demistifying ATS Implementation”***.



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Phase III Shortlisting Vendors

With stakeholder buy-in secured (or underway), a priority list of capabilities and features at your side, and a budget range defined, you're ready to sift through the sea of vendors in today's ATS marketplace. Think of Phase III like candidate screening – the goal is a shortlist of finalists.

STEP 1		STEP 2		STEP 3		OUTPUT
Identify potential vendors	→	Reduce based on needs assessment	→	Shortlist finalists	→	Vendor Shortlist

Timeline: ~4 weeks

Required Roles:

Recruiter | TA Leader | HRIT

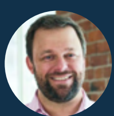
STEP 1: Identify potential vendors

With over 100 ATS vendors in the marketplace today, it can be both overwhelming and exciting diving into your search. Fortunately, there's no need to evaluate every provider. You can utilize industry resources, review platforms, and analyst reports to surface right-fit solutions upfront.

- [ ] ***Gather*** information

Worksheet H breaks down the research sources for identifying potential ATS vendors. Complete each action step for a quick, efficient exploration of the marketplace. If you're curious about which information is most helpful, the checklist below captures resource types at a glance.

> "Look for great technology, yes, but also for people you want to partner with. *A really good partner is key to success with an ATS.*"



Bill Peterson
Enterprise Account Executive
SmartRecruiters

Information checklist for a successful ATS vendor search

- [ ] Industry resources
- [ ] Review platforms
- [ ] Analyst reports
- [ ] Industry events
- [ ] Professional networks
- [ ] Colleague referrals
- [ ] Case studies
- [ ] Solution demos
- [ ] First-hand experience

STEP 2:
Shortlist vendors based on needs assessment

With your running list of potential ATS vendors established, it's time to trim down your options even further before sending RFPs. Your needs, desired improvements, and budget range will guide the way here. Reference Worksheets A and B to find this information if it's not handy.

- [ ] ***Score*** vendors

Worksheet I offers a high-level approach to scoring each potential ATS vendor across five essential categories.

- [ ] ***Determine*** compatibility

Worksheet J provides the option to then categorize each vendor by compatibility in an easy-to-reference quadrant and name your finalists.

Phase IV
Conducting RFP Reviews

Evaluating vendors for current and future needs through a comprehensive RFP is a required step for most medium- and enterprise-sized businesses. Phase IV walks you through this process of constructing a proposal, parsing vendor replies, and refining your list for a final decision.

This step might not be necessary for small businesses and startups. Only you can know if it would be necessary to complete an RFP in your organization. At a bare minimum, have a list of requirements and nice-to-haves, just like you would when hiring to find the best candidate.

STEP 1		STEP 2		OUTPUT
Build and send RFPs	→	Evaluate vendor responses	→	Vendor Finalists

Timeline: ~4 weeks

Required Roles:

Recruiter | TA Leader | HRIT | Procurement | Info Security

STEP 1:
Build and send requests for proposals (RFPs)

By this point, you've done all you can to evaluate vendors from public-facing information. Now, it's time to dive deep with an RFP that collects vital information about each provider so you choose the best one for your business needs.

One of the most important outcomes of an RFP (or list of requirements) is to understand a vendor's approach to implementation — including timelines and provided resources, as well as required resources you'll need to have. This clarifies whether a vendor can deliver what you need by when, which is why you'll want procurement's guidance at this stage of the process.

RFP Pre-Decision Milestones

Information to share with vendors

- Background on your business, including an introduction and overview, e.g. mission, products and services, people served
- Project purpose and goals, including type of ATS required and objectives with project
- Budget and scope of work, including specific services required
- Barriers or roadblocks, such as specialized requirements or limitations on resources
- Selection criteria, including desired CRM + ATS functionality
- Submission process, e.g. where vendors can submit bids, deadlines for milestones

1. Develop RFP with internal team
2. Send RFP to vendors with deadline
3. Evaluate vendor responses
4. Shortlist vendors
5. Schedule deep-dive demos

The importance of future-proofing in RFPs

By the time you implement a new ATS, you might already need new features and capabilities that you hadn't thought of during the RFP process. You can avoid this by asking providers about how they anticipate the future.

5 Prompts for assessing a vendor's approach to future-proofing:

- How often is new functionality added to the solution?
- How does the solution ensure data privacy and compliance?
- Does the solution easily pass the data we need for our data warehouse? For reporting?
- Do vendors or third parties implement/maintain the solution?
- What is the solution's approach to partnerships?

STEP 2:
Evaluate vendor responses

As RFPs are returned to you, you'll be inundated with hundreds of details. It can get overwhelming, fast, but this is the time (if ever there was one) to block off your calendar for deep focus work. Rest assured, the end of your ATS search is now in sight.

- [ ] ***Score*** RFPs

  Worksheet K offers an evaluation scorecard template for reviewers.

- [ ] ***Evaluate*** compatibility against cost

  Use Worksheet J again to facilitate a final decision. As you go through this step, it's helpful to prep your evaluation team with the rules of engagement below.

- [ ] ***Evaluate*** customer orientation of vendors

  Be on the lookout for vendors who respond to your requests with **enthusiasm and a spirit of collaboration**. How sales representatives listen to your needs and respond will tell you volumes about each vendor and whether they will treat you as a partner or just another account.

Rules of engagement for RFP evaluation teams

1. No member should discuss any aspect of the proposal with anybody outside evaluation team members.
2. No member should have a financial interest in any supplier recommended for award.
3. No member should have a personal interest in any participating supplier.
4. No member should bypass any security settings in a scoresheet and make unauthorized changes to the assigned requirement weights or group percentages.

Source: Gatekeeper

> ***"Don't allow and RFP to remove the human element of the process.*** Let vendors have a little bit of access to the business, so they can understand and translate the RFP. "

Patrick Harris
Senior Global Director, Account Management
SmartRecruiters

How to run an efficient RFP evaluation process

RFP evaluation process at a glance

STEP 1	STEP 2	STEP 3	STEP 4
Consolidate responses →	Engage evaluation team →	Conduct focus demos →	Analyze scores

1. **Consolidate responses**
   Create a master spreadsheet with vendor replies for easy side-by-side comparison.
2. **Engage evaluation team**
   Initiate evaluation process with team members; send vendor responses and scorecards.
3. **Conduct focus area demos**
   Prioritize showcasing core functionalities and integrations with relevant evaluation team members. Ask in-depth questions about implementation and support.
4. **Analyze scores**
   Consolidate scorecards and discuss discrepancies in opinions. Fill in the matrix.

Tips for keeping evaluators engaged and focused

- Provide clear directions for evaluators
- Limit participation to their area of impact
- Define scoring criteria and priorities upfront
- Establish due dates for feedback
- Remind them of the rules of engagement
- Celebrate them for their involvement

"***Don't underestimate the business value of trusted advisorship.*** If a vendor is trying to bend your process to their functionality, that's a red flag."

Nicole Hammond
VP Global Solutions Consulting
SmartRecruiters

Phase V
Making a Decision

With Phase IV complete, you should have at least two ATS vendors who are strong matches for your business needs. This final phase is where you'll select a winner and initiate essential finance, legal, and IT reviews so you can begin transitioning your project into implementation.

STEP 1		STEP 2		OUTPUT
Bringing it back to the business case	→	Navigate legal and IT reviews	→	New ATS Vendor Selected

Timeline: ~4 weeks

Required Roles:

Recruiter | TA Leader | HRIT | Legal | Exec Leaders

STEP 1:
Bring it back to the business case

Sitting with the final contenders in your Vendor Compatibility Matrix, it may be clear who the winner is (and if so, feel free to skip ahead to Step 2.) But if you're still torn between two or three solutions, the simplest way to find your new ATS is to bring it back to the business case.

Referring back to Worksheets C and D, or even your pitch to stakeholders from Phase II, zero in on the business value you wish to deliver with a new ATS.

RFP Post-decision Milestones

6. Select and notify vendor of choice
7. Negotiate contract
8. Begin implementation

- [ ] ***Make your final vendor comparison***

  Use Worksheet L to compare each ATS vendor's strengths and weaknesses to the priorities that align with your company's goals.

STEP 2:
Understand Legal and IT review tasks

IT and Legal play major roles in the vendor evaluation process — and they continue to perform essential tasks as you get ready to implement your new ATS. Ensuring good communication between these teams and the provider will help streamline the transition between solutions.

At large organziations, IT and legal review can take up to six months due to the amount of documentation, governance, compliance, and cybersecurity considerations.

The following list captures common legal and IT review tasks to get you started. For each item on your list, you'll want to identify the primary contact, due date, and any blocks to timely completion. Note that requirements vary widely by company, and yours may differ; use this list as a starting place for the final leg of your buying journey.

Legal Review Tasks	IT Review Tasks
☐ **Vendor contract** Termination and renewal terms, names, dates, values, etc.	☐ **Implementation roadmap** Milestones, timeline, tasks.
☐ **Compliance & HR governance** GDPR, HIPAA, SEC & SOX, etc.	☐ **Decommissioning roadmap** Timeline and tasks for sunsetting old ATS.
☐ **Data migration plan** Reinforcing compliance regulations.	☐ **API documentation** Account setup and questions answered.
	☐ **Risk mitigation** Unexpected compatibility issues, data loss, inadequate expertise, etc.
	☐ **Data cleaning and migration** Preparing data to be moved to the new ATS.

Conclusion

Investing in a new ATS is a considerable undertaking, from getting buy-in to managing stakeholders and evaluating vendors. Congratulations on making it through this multifaceted process! We hope this guide was helpful as you navigated the journey to better technology.

As you turn your attention now to implementing your new ATS, you can begin looking forward to the benefits of a modern talent acquisition suite in earnest: more qualified applicants, smoother hiring processes, and eventually, better quality of hire-all with a proven, easy-to-use system. We wish you luck on the next stage of your journey and all the exciting opportunities that lie ahead!

The benefits of a fit-for-purpose TA suite

Ready for Today	Ready for Tomorrow
Deep recruiting capability	AI-powered capability
Enterprise compatibility/ scalability	TA function maturity
Cross-platform, mobile readiness	Seamless experiences
Low IT cost & maintenance	Flexibility and scalability as business needs evolve
Consumer-grade user experience	Positive reputation and employer brand

ATS Buyer’s Guide Workbook

Step-by-step worksheets by phase

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Phase I
Defining Your Needs

WORKSHEET A:
Pain point identification framework & wish list

For each area of hiring listed below, explore the issues experienced for the relevant roles involved, including candidates, recruiters, hiring managers, admins, IT, and employer branding staff. Then list the desired improvements your team is seeking.

This exercise is best when completed by more than one person, so you may want to schedule a brainstorming session or workshop with key stakeholders to gather responses and identify potential solutions. Capture your responses from each party on the following criteria.

Pillars of Hiring Success

Talent Attraction & Engagement	Collaboration & Selection	Management & Operating Model
Sourcing & CRM	Screening & review	Integrations and connectivity
Job advertising	Hiring team collaboration	Mobile access (candidates and hiring managers)
Brand & experience	Interviewing and evaluation	Compliance and security
Referral management	Hiring plan	Flexibility and global coverage
Global & internal mobility	Offer management	Engagement and training
Agency management	Onboarding	Reporting & analytics
Diversity, equity, & inclusion		Team transparency

Material adapted from The Definitive Guide to Hiring Success.

WORKSHEET B:
Functionalities and features prioritization ratings

Rate your current system on a scale of 1-5, with 5 as highly satisfied, on these criteria.

Core Functionalities

Job posting	1 2 3 4 5
Applicant tracking	1 2 3 4 5
Offer management	1 2 3 4 5
Reporting & analytics	1 2 3 4 5

Additional Functionalities

CRM	1 2 3 4 5
Career site	1 2 3 4 5
Onboarding	1 2 3 4 5
AI-assisted hiring	1 2 3 4 5

Integration Capabilities

Existing HRIS	1 2 3 4 5
Payroll systems	1 2 3 4 5
Other TA point solutions	1 2 3 4 5

Scalability & Future Needs

Drag and drop tools	1 2 3 4 5
AI and automation	1 2 3 4 5
Self-serve administration	1 2 3 4 5

Configuration Needs

Flexibility to customize workflows	1 2 3 4 5
Integrations with key tools	1 2 3 4 5
Language localization	1 2 3 4 5
Customizable fields	1 2 3 4 5
Flexibility to customize workflows	1 2 3 4 5

Customer Experience

Dedicated support	1 2 3 4 5
Training programs	1 2 3 4 5
Optimization workshops	1 2 3 4 5
Certifications	1 2 3 4 5
Customer community	1 2 3 4 5

User Experience

Recruiters	1 2 3 4 5
Candidates	1 2 3 4 5
Hiring managers	1 2 3 4 5
Admins	1 2 3 4 5

Data Security

Centralized data storage	1 2 3 4 5
Candidate retention	1 2 3 4 5
AI	1 2 3 4 5
Reporting & analytics	1 2 3 4 5

DE&I

Inclusive job postings	1 2 3 4 5
Accessible interviews	1 2 3 4 5
Sourcing flows for underrepresented groups	1 2 3 4 5

Compliance

Global and regional compliance	1 2 3 4 5
Compliant hosting	1 2 3 4 5
Data agreements	1 2 3 4 5

Phase II
Proving the ROI

WORKSHEET C:
Efficiency checklist for a new ATS

Value Drivers	Feature	Current ATS	Modern ATS
Recruiter Productivity & Quality of Hire	***Automated interview scheduling.*** Self-schedule interviews, integrated interviewer calendars.		✓
	Automated candidate screening. Text messaging, chatbots, pre-hire assessments, AI-based intelligent matching.		✓
	Streamlined hiring processes. Embedded scorecards, Net Hiring Scores.		✓
Candidate Experience	***Simple application process.*** No account creation requirement, seamless application experience.		✓
	Streamlined offers. Same-day offers, digital routing, pre-configured template library.		✓
	Empowered internal mobility and referrals. Internal jobs portal, clear referrals, engagement tools.		✓
Hiring Velocity	***Improved reporting relevancy.*** TA analytics, KPIs in a single dashboard.		✓
	Integrations with time and money-saving tools. Open platform, add-on solutions.		✓
Talent Attraction	***Effective and efficient advertising.*** Centralized management of job advertising, optimized job spending.		✓
	Amplified employer brand. AI-based personalization, SEO optimization, video-enabled pages on career sites.		✓
Compliance	***Automated consent and candidate data retention.*** Consent configurations, automatic candidate data retention.		✓
IT Efficiency	***Streamlined recruiting tech stack and seamless connectivity to internal HR tech stack.*** CRM, job advertising, recruiting, onboarding, internal mobility, and referrals under one roof, lower maintenance costs.		✓

WORKSHEET D: Objection handling for a best-of-breed ATS vs. HRIS add-on

We already have an HRIS add-on. Why can't you use that?

Back-office human resource information systems that cover payroll, benefits administration, and performance management serve a different purpose than front-office applicant tracking systems (ATS) that respond to thousands of candidates seeking employment.

All systems are not created equal: what looks like good value on the surface can have these hidden costs when compared to a best-of-breed ATS;

- Poor candidate experience
- Higher recruitment spending
- Recruitment team efficiency and satisfaction
- Implementation and maintenance costs
- Innovation stagnation

Read 5 Hidden Costs of HRIS Recruitment Modules for the details.

We're already locked into a contract with our HRIS for the next X years. Why do the research now?

We don't have to wait for our contract to run out to make a switch. In fact, the costs involved in purchasing a best-of-breed solution vastly outweigh the pain points and business impact of using a poor-performing HRIS module to power our hiring (e.g. candidate drop off, high recruiting costs, etc.)

Why invest in a dedicated TA suite instead of an HCM recruiting module?

A best-in-class TA suite will help our company meet important and evolving needs, including the ability to test and experiment with new solutions, and a core system with open APIs will allow us to be more agile.

Read What to Do if You're Locked In With an HCM Recruiting Module for more detail.

An HRIS module is cheaper. Why should we pay more for a net-new solution when we could just add on a module?

Vendors focused solely on talent acquisition devote 100% of their development time to solving problems in recruitment. Because recruitment products are their primary source of revenue, TA-focused vendors invest deeply in supporting and retaining customers and using customer feedback to continuously innovate.

HRIS recruitment modules can keep us from building an agile talent acquisition function due to:

- Excessive length of time to make changes slows down the ability to deliver value
- Fewer pre-built integrations with 3rd party solutions stagnate innovation

HRIS Recruiting Module vs. TA Suite Comparison

Capability	HRIS Recruiting Module	TA Suite
Deep Recruiting Functionality	★	★★★
Enterprise	★★★	★★★
Compatibility/Scalability	★	★★★
Cross-Platform, Mobile Readiness	★	★★★
Low IT Cost & Maintenance	★	★★★
Consumer Grade User Experience	★	★★★
Expertise in Recruitment	★	★★★
Bundled Features	★	★★★
Total cost of ownership	★	★★

WORKSHEET E:
Role-based alignment checklist

Use this worksheet to inform how you will present the business case for a new ATS to each stakeholder group.

Role	Priorities	Metrics	Notes
HR Leaders	Ensuring that employees are being developed and are meeting their performance expectations.	Quality of Hire Conversion Rates Hiring Team Productivity Hiring Team Performance	
TA Leaders	Ensuring that the user experience is positive and hiring teams are engaged throughout the lifecycle.	User Experience Sourcer / Recruiter Engagement Sourcer / Recruiter Performance Sourcer / Recruiter Retention	
Business Leaders	Ensuring that they are recruiting, developing and engaging the best talent.	Quality of Hire Hiring Manager Engagement Cost Savings	
HRIT	Ensuring that solutions are integrated with core HR systems, compliance. Ensuring compliance and information security.	Security Compliance Scalability Integration Adoption	
Employer Branding	Ensuring the company is marketed effectively and attractively as an employer.	Company-to-Candidate Communications Digital Media Management Online Brand Presence Candidate Surveys	
Finance, Procurement, & Legal	Ensuring that the system fits into the overall HR budget, offers key capability requirements, and meets regulatory compliance.	Cost / Savings Adoption	

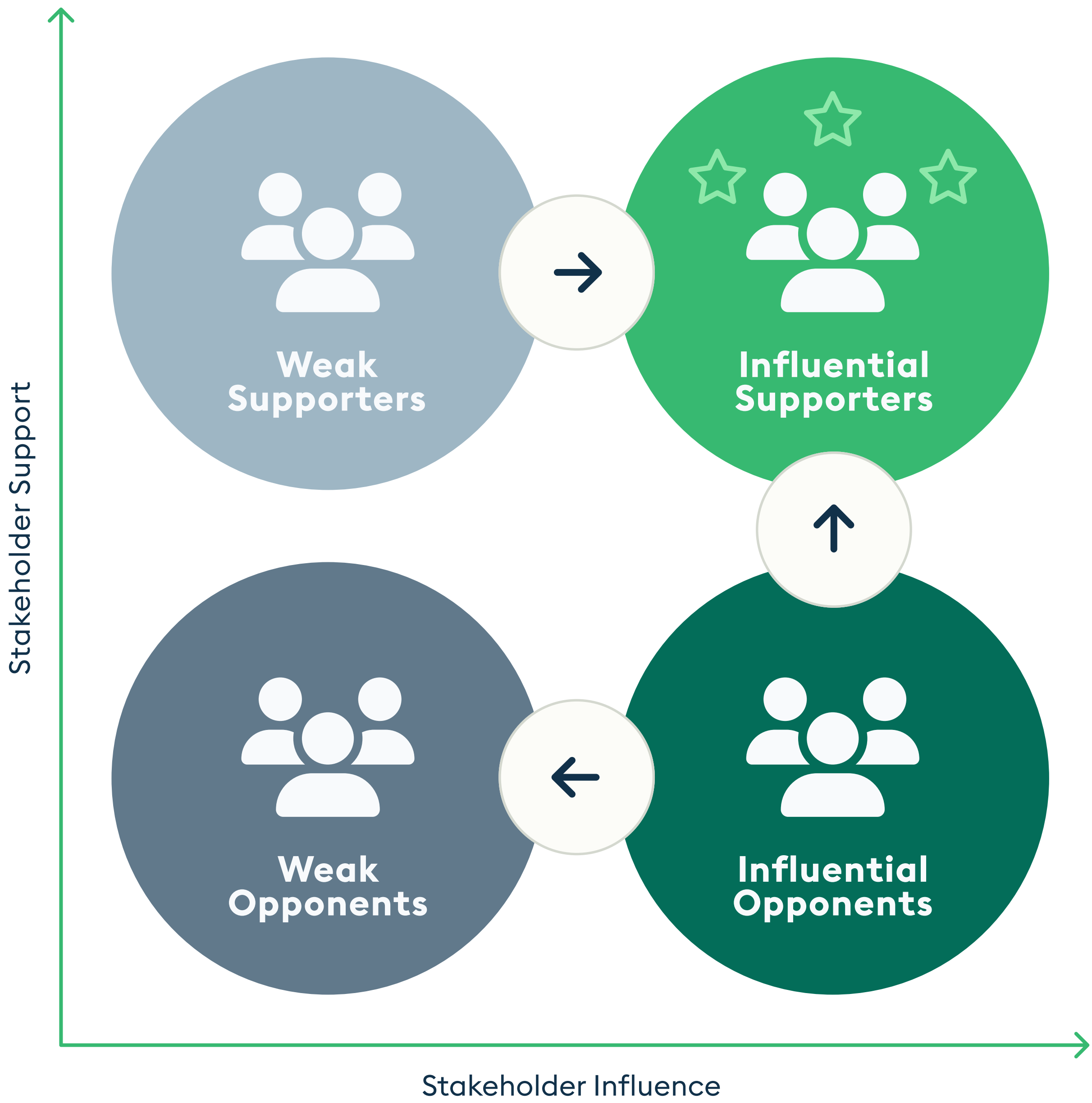
WORKSHEET F:
Stakeholder alignment

Use this worksheet to gather information on each stakeholder and develop your narrative strategy for the business case. Refer to the personal and professional values listed on page 10 to fill out the grid.

Stakeholder Name	
Personal Values	
Professional Values	
Business Priorities/ KPIs	
Metrics to Include	
Relevant New ATS Value Props	
Reasons to Believe	

WORKSHEET G:
The Stakeholder Matrix

List names of stakeholders in each category and list strategies to move them into a more favorable position.



Weak Supporters

Tip: These can be monitored less closely, but where possible, pair them up with influential supporters to catch their enthusiasm.

Influential Supporters

Tip: Encourage these to spend more time with weaker stakeholders, as seeing positivity first-hand can lead to changes in opinion.

Weak Opponents

Tip: Offer these an increased level of responsibility, which can lead to a higher level of engagement in the project over its course.

Influential Opponents

Tip: These should be closely monitored, managed, and moved out of this quadrant as soon as possible.

Phase III
Shortlisting Vendors

WORKSHEET H:
Research checklist for your ATS search

Focus Area	Actions	Your Notes
Network Outreach	☐ Send messages to industry colleagues. ☐ Query professional networks	
Review Platforms	☐ Consult review platforms and read user ratings.	
Analyst Reports	☐ Read analyst reports.	
Industry Events	☐ *Optional: Attend industry event.*	
Industry Resources	☐ Read "Top ATS for 2024" listicles from industry publications.	
Demos	☐ Request demos from the top 5 contenders. ☐ *Optional: Attend industry event.*	
Vendor Finalists	☐ Shortlist based on needs assessment.	

WORKSHEET I:
Vendor scorecard

Fill in the name of each vendor and score (1-5) from least to most compatible.
Add up the scores for each column.

	Vendor 1	Vendor 2	Vendor 3	Vendor 4	Vendor 5
Feature set vs. desired functionalities					
Budget compatibility					
Vendor reputation					
Customer support					
Product reviews					
Compliance and infosec requirements					
Case studies					

Total Compatibility Score					

WORKSHEET J:
Vendor compatibility matrix

Lower Compatibility / Higher Cost [insert vendor names]	Lower Compatibility / Higher Cost
Lower Compatibility / Lower Cost	**Higher Compatibility / Lower Cost**

Phase IV
Conducting RFP Reviews

WORKSHEET K:
RFP evaluation scorecard

Fill in the name of each vendor and score (1-5) from least to most compatible.
Add up the scores for each column.

Criteria	Vendor 1	Vendor 2	Vendor 3	Vendor 4
Functionality				
Feature fit				
Enhanced productivity				
Affordability				
Pricing structure				
Add-ons and fees				
Usability				
Ease of use				
User interface				
Flexibility				
Flexibility to configure				
Integration capabilities				
Compliance				
Security				
Data privacy				
Partnership				
Customer support				
Demos				

Responsiveness during RFP				
Future-readiness				
Product roadmap				
Analyst scores for innovation				
Implementation				
Timeline				
Resource requirements				

Total Score				

Phase V
Making a Decision

WORKSHEET L:
Final vendor comparison

Insert your final scores on a scale of 1-5, and add up the totals for each column.

Business Priority	ATS #1	ATS #2	ATS #3
Budget alignment			
Modernization			
Future-proofing			
Scalability			
Employer brand			
ROI			
Partnership			
Transparency through better data			
Integrations			
Total Score			

Appendix

Additional Resources

Applicant Tracking System RFP Template

A comprehensive list of all the features needed to provide a great candidate experience and recruit more efficiently. Hit the ground running with this pre-populated Google Sheet, complete with evaluation criteria, instructions for vendors, and solution requirements.

The Definitive Guide to Hiring Success®

This in-depth guide is the playbook for modern TA leaders to future-proof their organizations. It guides readers through each step of the Hiring Success methodology and provides real examples of organizations that transformed their talent function to create lasting impact.

A Seat at the Table: Guide to Leading a Strategic Talent Acquisition Function

When TA lacks a seat at the table for high-level talent decisions, your organization misses out on its ability to contribute to success. This practical guide will help you lead your TA function away from being considered a cost center and becoming the strategic function it deserves to be.

SmartRecruiters

About SmartRecruiters

SmartRecruiters powers Superhuman Hiring™ by freeing talent acquisition teams from legacy applicant tracking software, and equipping them with next-gen AI functionality. SmartRecruiters' platform serves as the hiring operating system for 4,000 customers, including Bosch, LinkedIn, and Visa. Companies with business-critical hiring needs turn to SmartRecruiters for best-of-breed functionality, world-class support, and a robust ecosystem of third-party applications and service providers.

See SmartRecruiters in action

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