

# 10 Steps to a Successful Staffing and Recruitment Software Implementation

*Understand the entire implementation process before making a software change*

*This paper offers staffing and recruitment management a proven, well-researched 10-step guide to the successful implementation of your chosen staffing and recruitment software.*

# Contents

- 3 | Introduction
- 3 | Create a staffing software Implementation Project Team
- 4 | Provide internal communication
- 4 | Measure your progress
- 5 | Internal Project Management
- 5 | Review your processes
- 6 | Understand the migration process
- 7 | Consider your training objectives
- 7 | Assess your reporting needs
- 7 | Plan a thoughtful go-live
- 8 | Commit to ongoing education and improvement
- 8 | Summary

# 10 Steps to a Successful Staffing and Recruitment Software Implementation

**S**oon after selecting new recruitment software, your agency will eagerly anticipate the many benefits your investment in this technology will give them. It is exciting to imagine how your new software will improve your processes, increase your productivity, and make everyone's lives easier. All of these outcomes are achievable, but often the implementation of new software fails to meet everyone's expectations.

From minor to major, there are many different reasons why your implementation can fall short.

- The project fails to start because the agency is unable to prioritise and make time for the implementation
- The project faces lengthy delays and increased costs as project tasks go uncompleted or are done incorrectly
- The project is completed, but the go live goes poorly; users fail to adopt the software, so the recruitment agency reverts back to their old software

Fortunately, there are best practices your company can follow to avoid these situations. Here are ten tips you can use to help exceed everyone's expectations and realize all the benefits of your new recruitment software.

## 1. Create a Staffing Software Implementation Project Team

Preparation is key. Your chosen software provider should have the best team in place to help you through the implementation, but without your own 'A Team' in place you are limiting your success. Designate your own internal Project Manager. Make sure it's someone who can devote themselves to the project, not someone with multiple other projects to juggle and manage at the same time. Review upcoming scheduled PTO or maternity leave which could have an impact on the timeline. Assemble a team you know will champion the system and motivate and encourage the rest of the company during the change.

Depending on the size of your agency, this could be a team of one or ten. Regardless of the size, your team should be prepared to fill the following roles:

- **Project Management:** ensuring your agency is fulfilling their responsibilities on the project. If you are considering a data migration, you may want to include an expert who knows your old system inside out and can help during the mapping and translation process
- **Communication:** ensuring your agency receives all the necessary information regarding the project and the new software
- **Change Management:** ensuring the users are prepared for the change to new staffing software



- Internal Software Expert: ensuring the users have an internal resource available for assistance
- Trainers: do you need a team of trainers, or will one person suffice to get all employees up to speed on the new software?

## 2. Provide Internal Communication

Frequent and consistent communication with the users of the new software is an important factor in the success of an implementation. This communication can take many forms. Communication can generate excitement, share company objectives, prepare users for change and reinforce training. Here are a few things we have seen our customers do that helped make their software implementation successful:

- An introduction presentation gives all users a preview of the exciting functionality coming in the new software and also communicates the goals for the project
- Regular updates on upcoming project dates including testing, training, and go-live
- Regular emails presenting exciting new features that users can expect with the software.
- Gifts and marketing items you can hand out to the team. These could be mugs, pens or even t-shirts. Make it a big deal and they will too!

Implementing new software can be a very straightforward process. However, without updates and shared information, anyone not involved in making decisions can be left feeling in the dark, worried and anxious about what it might mean for them. Celebrate the implementation process along the way!

## 3. Measure your progress

How do you keep everyone on track? If you aren't getting them from your provider, ask for regular updates. Key tasks and milestones will be set for you and the team you are working with, and it's important both sides meet their goals.

Your software provider should produce an overall project plan at the start of the implementation. This should include dates and tasks for some of the following milestones:

- Any software installs necessary
- Migration tasks and milestones if necessary
- Initial training for any system administrators
- End user training

This project plan should be updated and shared regularly, marking tasks complete as needed. You may wish to create your own project plan for internal tasks, or request these are added to the overall project plan by the provider's Project Manager.



### Tip

Use a project introduction presentation as a tool to bridge the gap between purchase and implementation. It is a great tool to remind the users of the objectives of the project.

## 4. Internal Project Management

When implementing new staffing software, your agency should be an active participant in the process and will have its own share of project responsibilities to be completed. Failure to complete your project tasks can lead to project delays, increased costs, and sometimes even project failure. There are project management best practices you can use to ensure your staff are on track.

- To start, identify the tasks on the project plan for your staff. Assign the tasks with specific dates and resources for completion.
- At the beginning of the project, review the plan with all users who have responsibilities on the project.
- On a weekly basis, email the appropriate users reminding them of upcoming responsibilities.
- When work is not completed or being delayed, handle the issue as soon as possible. Do not wait until a due date has passed before addressing an issue.

## 5. Review Your Processes

Truly successful software implementations are done by staffing agencies that go beyond simply installing new software; instead, they incorporate the new software into their business and processes from day one. In order to achieve this success, the changes must be managed throughout the implementation and your users must be represented with each step. Here are a few ways to ensure your new software is incorporated into your user's daily lives:

- At the start of the implementation, meet with each department and identify the following two things:
  1. Processes that the users must be able to accomplish on day one of using the software in order to do their jobs
  2. Processes that the users want to add or improve upon

This is very important, because users who are unable to do their day-to-day jobs will quickly abandon new software and users who are unable to find the added benefits of the new software will quickly become frustrated with the change.

- During the implementation, get members of each department involved in testing. The software should be tested thoroughly to ensure the processes identified above work, and the data migration should be tested to ensure your data is implemented appropriately within your new staffing software.



---

### Tip

The right CRM can help a business maximize its opportunities. Be sure to review your own processes for effectiveness and efficiency prior to using your new software.

## 6. Understand the migration process

Moving your existing data to the new software isn't always the right decision. Rubbish in one system is just rubbish in the next. Sometimes a fresh start is a good idea. Hand typing your key records can help with the training your team needs, and make sure you only bring over the quality information. However, a migration isn't as simple as a copy and paste of data from one source to another. So if you do decide to move forward, be sure you understand what is and what isn't possible. Don't assume every last piece of information can be migrated to the new system. Be present in any mapping or translation discussions, and ask lots of questions along the way.

Doing a migration is a great time to assess your data, and only bring over the best quality records and information. It might be possible to map every single field and bring over every single record, but use this time wisely and do some housekeeping.

Data cleansing is an important part of the project. Consider using some kind of filtering, such as only migrating candidate records who have been placed in a job within X number of years, or only bring notes or journal entries from the past five years.

How will you handle duplicate data? Do you have three 'John Smith' records that are really the same person? Are there a handful of 'ABC Company' records that should all be one company? If your current system allows for merging of records, start tackling this now. Your data will most-likely be migrated as it is delivered to the provider, and probably cannot be merged during the process. You should be provided guidance and support as to what methods can be used to help remove duplicates as part of your aforementioned filtering criteria.

Having a designated internal project manager for the migration is a key component of its success. Be sure to have someone with technical knowledge of the database you are moving from and the application and business workflows involved in the process. This is extremely helpful when making mapping or translation decisions. If you have duplicate records, merge or delete as permitted within your current system.



### Tip

Be sure to have someone with technical knowledge of the database you are moving from and the application and business workflows involved in the process

## 7. Consider your training objectives

Have you thought about how you are going to train your team? Do you have trainers already in place and ready to learn the new system? The right approach for you can depend on the size of your organization. Less than five users, you can most-likely have them all trained online and ready to go in a few weeks. For a large organization with multiple branches or lines of business it would make more sense to train several key people who in turn can train the rest of your staff. Just make sure you discuss this beforehand to know how to approach your training in the most time and cost effective way.

Will you expect users to learn in their own time? This could create resentment and frustration before they have even seen the new system. If you are able to carve time out of their day to train, when they can step away from their day to day work, this will allow them to focus all of their attention on learning how to use the software. Consider how close to going live on the system you need to have everyone trained. Too early and they will forget everything learned. Too late and they will feel rushed and ill prepared. Discuss different approaches with your Project Manager, they will be able to suggest successful approaches taken by other clients, and figure out the best fit for you and your recruitment agency.

## 8. Assess your reporting needs

Do you have reports which are run on a daily, weekly or monthly basis? Is there a report you couldn't run your business without? Discuss those with your Project Manager at the start of the implementation project. Don't assume your report is a standard one that every other agency uses, it could be unique to you.

Even though you might use a particular report now, you might be able to get all the information you need from a search or dashboard already built in to your new recruitment software. Be sure to check with other departments and individual users to make sure all needs are catered for where it makes sense.

## 9. Plan a Thoughtful Go-Live

Your staffing software go-live should be a well-planned and executed event. Every go-live has many moving parts and many opportunities to fail. Your go-live can be smooth with just the right attention to details such as:

- Pick a go-live date that ensures a successful implementation
- Create a checklist of all aspects of the go-live and review it with everyone who has a responsibility
- Create a contingency plan that minimizes disruption to the end users
- Appoint internal software experts or champions in every department. These champions should proactively engage the users during the first week of go-live.
- Have a daily meeting scheduled for the first week of go-live that gives users the opportunity to raise questions and issues
- On launch day, cater in breakfast or lunch to celebrate. Make everyone feel part of the process and acknowledge individuals for their hard work.



### Tip

Your go-live can be smooth with just the right attention to details. Make everyone feel part of the process and acknowledge individuals for their hard work.

## 10. Commit to Ongoing Education and Improvement

Although this should be easy, sometimes coming up with a timeline can be difficult. In an ideal world, you would be up and running on a new software system with a click of your fingers....but that's an unrealistic expectation. To implement successfully, consider all of your users' needs. Consider how long it will take them not only to learn the new software, but adapt to the change. Rushing it can cause stress and panic, while taking too long can mean training is wasted and needs to be redone. A fine line between the two is needed. Follow these best practices for that assurance:

- Plan future implementation of unused features. There may be features of your staffing software that you did not want to start using from go-live. Put a timeline in place to implement those features before they are forgotten.
- Manage new versions like mini implementations. Software upgrades often include exciting new features for your staffing agency, but without proper management, new features can be wasted. Ensure the users are ready by communicating new features and providing training.
- Continually train new and existing staff. As staff turnover slowly erodes your agency of your internal software champions, you may find that knowledge and use of your software declines. Continual training plans can mitigate that issue and sometimes they don't require a lot of time.

### Summary

To implement successfully, consider all of your users' needs.

New staffing software is an exciting investment and provides you a great opportunity to improve your business. With the right team, planning, and execution, you can maintain the excitement and ensure continued success throughout the implementation and beyond.

1. Create a staffing software implementation Project Team
2. Provide internal communication
3. Measure your progress
4. Internal Project Management
5. Review your processes
6. Understand the migration process
7. Consider your training objectives
8. Assess your reporting needs
9. Plan a thoughtful go-live
10. Commit to ongoing education and improvement



### Tip

Ongoing education ensures your staffing software and processes remain relevant to your users and helps prevent another software selection process too soon into the future.

# Recruitment and Staffing Software for Fast-Growing Firms

Achieve efficiencies and enhance cross-company collaboration with Adapt's recruitment software that ensures your staffing firm will succeed, grow and expand beyond expectations.

An intuitive and powerful solution for scaling and fast-growing staffing firms.