



WHITE PAPER

BACKGROUND SCREENING: 4 IMPORTANT CONSIDERATIONS WHEN TRANSITIONING TO AN ATS INTEGRATION

Thinking about enhancing your candidate and recruiter experience by integrating your Applicant Tracking System (ATS) with your background screening program? Outside of the technical mechanics of ensuring ATS 1 speaks to screening system 2, there are other factors that need to be considered to ensure a smooth and efficient transition before you even get started. Here are a few that we think are most important.

1. BE THE CHANGE YOU WISH TO SEE IN YOUR PROGRAM - KNOW & DOCUMENT DESIRED PROCESSES

As with any transition, it offers a good opportunity to review your existing program to decide what things you want to keep/replicate, and what things you'd like to change or enhance. Not all programs will require a change necessarily, but too often organizations will simply attempt to replicate what they have "because that's how it's always been done." Use this time of transition to step back and ask, ideally, how do you want your program to run, and what would the best candidate and recruiter experience be? Consider for example:

- Do your workflows have too many unnecessary or repetitive steps?
- Are applicants required to fill out information twice because the data isn't integrated between the ATS and your screening provider?
- Does your finance team require invoices separated by department and are those fields captured at the point of entry and integrated?
- What are all the key fields for reporting that you need integrated with your screening provider? (i.e. position, work location, department, hiring manager, etc). At what point is this data collected, and does it introduce risk for inconsistent data, errors and inaccurate background requests?

Document these desired workflows and key points internally with stakeholders before engaging the technical experts. Most implementation specialists can guide you through a change management process if needed, but that type of engagement can get costly and can often be managed in-house. Designate an internal owner to collect information from across all stakeholders (recruiters, compliance, HR Managers, Legal, Finance, etc.) and have them consolidate feedback to make a recommendation. Likewise, even if no changes are suggested at least you've taken the time to understand and document your current

program as a blueprint for what you expect from your ATS and screening vendors. One pitfall we often see, is that companies uncover things about their program they weren't aware of up front, which then have to be solved for mid-implementation, causing delays and scope creep in the project plan.

Key takeaway: Make sure you are starting with a full picture of what is involved in your recruiting and hiring process (what is and what you'd like it to be) at the outset of your engagement to integrate.

2. HELP US HELP YOU - WHAT CRITICAL BUSINESS ISSUES ARE YOU TRYING TO SOLVE FOR?

ATS and screening vendors have multiple solutions for a myriad of problems. But they can't help you if they don't know what problem they are trying to help you solve. Again, do your homework up front on this. Document what issues are critical to your business that you are hoping to solve for with the proposed solution. Take the time to gather feedback from your internal end users around what common issues they encounter on daily basis? For example, is it easy to access all relevant candidate information in a single place or do they have to log in and out of multiple systems to get a clear picture? Will additional email notifications help to keep users updated on the progress? Make sure those are documented as requirements or at least questions for your vendors to ensure they have a solution to propose.

Along the same lines, have you surveyed recent applicants or new hires to gather input around their experience in the application and onboarding process and include those in your critical business issues as well. Companies should not be losing great talent to their competition just because applicants are discouraged and overwhelmed with the process. For example, are there too many manual steps or duplicate data entry required? Sometimes if the ATS vendor does not enforce validation rules for certain fields (i.e. dates of residence history, or city/state/zip code validation) applicants may be required to update or correct this information later on the screening side which may delay their background check. Discuss best practices with your ATS vendor as well as your screening provider to continue to invest in improving applicants' experience.

Documenting critical business issues and clearly articulating them to your vendors up front may feel excessive, but it can be tremendously helpful because you are helping to establish a benchmark for that company to compare themselves against. If you've brought them a list of 10 critical issues they want solutions for and they check the box on nine of them, we know we are doing a good job. Same goes for key metrics. Share your internal SLA's and metrics for turnaround time and others with your vendor, so they can help you track and monitor how you (and they) are doing. Ultimately, your success is their success. In most cases, your vendor will do everything in their power to help you, but you need to be sure to communicate what the goal is.

3. MORE IS NOT ALWAYS BETTER - SELECT YOUR ATS INTEGRATION PACKAGE & CUSTOMIZATIONS WISELY

Most ATS vendors offer a variety of solutions to your company. Make sure that you choose one that is best tailored to your organization's current capabilities. Your ATS vendor should meet you and your company where you are. Meaning, if you know you have limited internal bandwidth to support HR technology solutions, make sure to choose a limited or generic version, with limited customization at the outset. Don't get caught up in too many bells and whistles or "vision selling." This essentially means they are selling the vision of what your program "could" look like in the future. Be realistic about where your company is now in the HR life cycle, and trust that you can always add additional features and functionality later when/if you decide you need it. Package deals may offer your company features users will never need, and while it appears you'll be saving money by bundling, in reality you may end up paying for functionality

for months or years that end users may never take advantage of. Likewise, over-customization at the outset may bring more disadvantages than advantages to your processes. For example, customization work can be difficult to support over time and ultimately costly to the organization. Start simple, and then expand functionality as needed. For a second opinion, discuss your ATS needs with your screening provider for an objective opinion around what features might be useful to take advantage of versus not.

4. START WITH THE END IN MIND - CONSIDER WHAT YOUR POST-IMPLEMENTATION SUPPORT PLAN LOOKS LIKE

It is a common for ATS vendors to use third-party consultants from other companies for implementation services. There is usually an upfront scope of work for services to get you and your company live on the ATS-integrated solution with your screening provider. However, you should also be sure to discuss what the plan for support is once your company goes live. Who will be supporting your company's account? Will the third-party consultant or the ATS vendor be expected to help maintain and troubleshoot issues that come up over time. Did your consultant provide any detailed technical requirements as a roadmap for future technologists who may be pulled in at a later time to update or change the account? Do you have a designated account representative with your ATS vendor, or is there just a general support line to utilize? Start with the end in mind and be sure that your organization is not left in a bad spot in the event that an error occurs or something needs to be changed or updated. These and other questions should be answered by your ATS vendor before you sign a contract.





ABOUT INTELLICORP

Since 1996, businesses and organizations have depended on IntelliCorp to help them hire and recruit quality talent and volunteers. Whether you operate locally or internationally, our products and services assist you in making better decisions and promoting a safe workplace.

Our commitment is to provide you with a full circle of excellence in background screening. We think you'll find everything you need to create a program that meets your business or organizational requirements. With easy-to-use technology, best-in-class service, regulatory compliant processes and cost-effective solutions, we give you the tools and resources needed to onboard your applicants and volunteers with confidence.

The background screening industry is continually evolving, and we make it a priority to be at the forefront of the changes that impact the screening industry, especially when it comes to newly enacted legislation, legislative updates or shifts in compliance guidelines. We provide many resources to help you stay compliant, including training courses, sample forms, manuals and a complete learning center full of materials.

We're dedicated to keeping our clients and their screening programs at the center of everything we do. IntelliCorp is a Cisive Company, and we continue to grow and invest in our employees, products and technology. We also place a high value on corporate citizenship; serving others and giving back.

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