Implementation Overview
Cyber Recruiter

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Implementation Methodology

Visibility Software uses a methodology for implementation and training which has evolved over years of service. Having worked with clients over the last five years installing Cyber Recruiter, we have found most companies do not have the resources to put ongoing recruiting activities and projects on hold for an extended time period in order dedicate days of uninterrupted time to set up a system and perform training. We have also found that most people can only absorb or assimilate about 2-3 hours of new information during a single session.

In response to these observations, we have developed a unique implementation methodology which started with the decision to host all implementation projects on Visibility Software servers. This allows for flexibility within the project in various areas.

- First, it allows the client's IT department time to set up infrastructure without delaying the project start.
- Second, implementations can be more flexible in scheduling since a consultant does not have to be on-site to conduct training or assist with setup.
- Third, it allows for decisions to be made through the process instead of at the beginning of the project.

Taking advantage of these benefits, we have structured an implementation which works for both large and small clients, clients with one location or many, clients with one recruiter or several. The implementation generally involves developing a project plan used throughout the project, several 2-3 hour weekly meetings held remotely via conference call and web meetings, and assignments between each meeting. The meetings and 'training sessions' are designed for the core users (Recruiters, HR, and/or Administrators) of the system and allows the implementation group to continue on with daily responsibilities while implementing a new software solution without being overwhelmed by the implementation project.

During each weekly web meeting, the group will review any previously tasked items, address new topics and allow for a question and answer session. This standardization and breakdown of meetings by topics allows for the content to be covered gradually during the implementation to ensure understanding and allow for setting up of the options during the implementation process. If significant sections of tasks slated to be complete as client homework are not accomplished before the next session the meeting may be rescheduled, allowing the overall project to stay focused. Based on client feedback and satisfaction surveys, we have found our clients and their recruiting processes to be ready for a "live" successful operation upon completion of the implementation process.

Project Start

Each project will start with the purchase of software and sign-off on agreements ((1) Professional Services Agreements and (2) Statement of Work for the project). Payment for services and the sign-off of the agreements triggers our Professional Services team to contact the Project Contact to schedule the first call for the implementation team – the Meet & Greet call.

The following process is an example of our typical implementation process which ranges from 30-70 days. This process will be configured specifically for your organization based on our discovery meeting at the beginning of the project.

* Times noted are estimates for meeting times only and do not include time for assignments between meetings, project management, or configuration of the system.

Summary of Implementation Plan

Phase 1: Setup & Configuration
- Pre-Meeting Tasks
- Meeting 1: Meet & Greet
- Meeting 2: Requisition Creation
- Meeting 3: Requisition Approval and Posting
- Meeting 4: Adding and Evaluating Applicants
- Meeting 5: Hiring Applicants
- Meeting 6: Job Browsing, Applicant Profile Creation and Maintenance
- Meeting 7: Advanced Topics and Security
- Meeting 8: Summary & Review
- Meeting 9: Transfer of Data (Not for ASP clients)
- Meeting 10: Connectivity Meeting (Not for ASP clients)

Phase 2: Internal Staff Training (Managers, Executives, other HR Staff)
Phase 3: Activate Public Websites
Phase 4: 6-Month Checkup

PHASE 1: Setup and Configuration

Pre-Meeting 1

Client Preparation

Identify Project Team

Start to identify the people who will be involved in the project. The project group should include at least one member of the Human Resources group and someone from IT. Additional members could include a specialist on the website, a hiring manager who will be involved in the implementation process or a VP overseeing the implementation. The group should plan on being in attendance for the first meeting and during that meeting it will be determine what the additional involvement should be for the rest of the project.

Collect Data

Collect various forms, written documents or ideas on processes which you currently have which will be discussed at the first meeting.

Review Navigation Webinar (7 Minutes)

This on-demand webinar reviews the basic navigation of Cyber Recruiter.

Review Resource Webinar (10 Minutes)

This on-demand webinar reviews understanding documents and resources which will be available during the implementation and after Cyber Recruiter is live.

Visibility Software Preparation

Identify Project Team

Assign a Project Manager from Visibility Software to act as the primary point person for the project. This person should discuss any known needs of the client with the sales group and transition the project over to the Professional Services group. The Project Manager will also identify any other members of staff who should be involved in the first meeting as well.

Meeting 1: Meet & Greet (2 - 3 Hours*)

This will be the first meeting of the implementation team. This meeting is designed to provide introductions, discover expectations, review the recruiting process, determine additional needs or requirements not discovered in the sales process and to set a timeline. This session thoroughly reviews the organization's current recruiting process and what the client hopes to gain by implementing Cyber Recruiter. Based on this meeting, Visibility Software will draft a Project Plan to be used as a guideline for the remaining meetings.

Items Needed:
- Technology Overview – IT Contact should read the requirements
- Implementation Overview – HR & IT Contacts should review this document

- Calendars/Schedules – To set up the rest of the meetings for this project

Items to be discussed:

- Team Members
- Technical Questions
- Goals for this Project
- Current Recruiting Strategy and Changes to Make
- Implementation Process and Expectations
- Project Timeline

Client Homework

Finalize Data Conversion Expectations

Review the current systems and processes to determine which pieces of information will be converted over to Cyber Recruiter during the implementation (employee records, users, applicant data and/or job requisition data). Visibility Software will assist in bringing in basic applicant and requisition information using the tools in the product; reference back to the SOW for a list of the fields to be imported as part of the project.

Review Requisition Request Process

Visibility Software will provide access to the client's base system and instructions on how to log into the system to create a requisition. Client will go through the process specified in the base system and make note of how this system differs from the intended outcome (fields which should be added, additional approvers, etc.).

Visibility Software Homework

Project Plan

Based on the discussions in the first meeting, Visibility Software will update the Implementation overview to include specific topics to cover at each meeting, dates, times, expectations, goals, etc.

Meeting 2: Requisition Creation (2 - 3 Hours*)

This session will focus on the Requisition creation process. The client will have gone through the base system and made notes on the areas to change regarding the requisition request so the session will start with a question and answer discussion. Based on the feedback from the client, the group will work together in the Admin section to update the various sections which are connected to the creation process.

Based on the needs of the client, additional items which could be discussed include:

- Modifying the Requisition Fields
- Modifying the Requisition Creation Process
- Modifying the Print Requisition Report
- Modifying Drop-down values
- Mass Importing

Client Homework

Population of Data

The client will start to add in drop-down values related to the requisition file. These may include, but are not limited to Organizational Structure, Job Types, Reasons for Openings, Salary Grades, Employment Types and current open Requisitions and Requisition Templates.

Meeting 3: Requisition Approval and Posting (2 - 3 Hours*)

This session will focus on approving and posting requisitions in Cyber Recruiter. The group will work through the flow of information via the various screens in Cyber Recruiter and via email.

Then, they will change perspectives and address how to modify emails and settings using the Admin tools.

Based on the needs of the client, items which could be discussed include:
- Standard approval process vs manually over-writing the approval process
- Tracking costs, notes and history
- Working with Job Boards
- Modifying Standard Templates
- Job Board setup

Client Homework

Population of Data

The client will add any additional drop-down values related to the new topics and review the configuration for the email templates related to the emails triggered during the requisition process.

Adding Requisitions

The client will start to import or add all historical requisitions into the system via the standard requisition creation process or via the importing process.

Meeting 4: Adding and Evaluating Applicants (2 - 3 Hours*)

This session focus on adding applicants into Cyber Recruiter, searching the applicant database and evaluating applicants against job requirements. The group will also discuss any standard communication typically sent to Applicants during the evaluation process and how to capture that information in Cyber Recruiter. The final topic will be scheduling and evaluating applicants via the interview process.

Based on the needs of the client, additional items which could be discussed include:
- Basic import vs Advanced Import
- Importing Applicants
- Update Application Questions
- Custom Email Templates
- Creating Advanced Searches
- Interview Evaluation Form

Client Homework

Adding Applicants

The client will start to import or add all historical applicants into the system via the standard add applicant action or via the importing process.

Custom Communication

The client will start to set up all needed email correspondence for communication to the Applicant.

Meeting 5: Hiring Applicants (2 - 3 Hours*)

This session focuses moving the Applicant through the final stages of the evaluation process and to the offer and hire stages. The group will generate and approve an Offer Request, create and Offer Letters and finalizing the on-boarding process. The group will then review the pages

Based on the needs of the client, additional items which could be discussed include:
- Background screening
- Reference Checking
- Paying Employee Referral Bonuses
- Creating Offer Letter Templates

Client Homework

Practice

The client will move an applicant through the process of evaluation and hiring to finalize the flow of information and the process to be used going forward.

Custom Communication

The client will start to set up all needed letter correspondence for communication to the Applicant.

Review Online Application

Using the client's base system website, client will go through job browsing section and apply to a job. Clients should take note on the process, questions asked, topics addressed, message used for instruction and make note of any changes which should be made.

Review Self Service Module

Using the profile created as part of the Online Application log in to the Applicant's Self Service Module and updates the record. Make note of any instructions, pages which are activated and general changes to make to this view.

Meeting 6: Job Browsing, Applicant Profile Creation and Maintenance (2 - 3 Hours*)

Up to this point, the group has focused on using the core system of Cyber Recruiter. Now, the focus will change to the externally seen portion of Cyber Recruiter, the Careers site. This site pulls information from the core system to post jobs for review to a location public to the world and then captures information about an applicant which is transferred back to the Cyber Recruiter system. The group will review the website prior to the meeting and the meeting will focus on making changing in the Admin section.

Client Homework

Finalize of Web Views

Based on the discussions, the client will finalize views accessible to the public via the Careers site.

Meeting 7: Advanced Topics and Security (2 - 3 Hours*)

Now that the group has seen all of Cyber Recruiter they will have a group discussion to finalize the various views and security in the system. The pages to finalize will include access to the Assigned Apps page in the Requisition, the Inbox and Req List view and security in general.

Based on the needs of the client, items which could be discussed include:

- Finalize Group Security
- Working with the Views (Inbox, Home Page, Req List, Open Activities)
- Understanding the Assigned Apps Page

Client Homework

Finalize Security

If there are more groups to security than the group covered during the session, the client will work to complete the security settings.

Import Users

Add any users (Approvers, Managers, Recruiter, Interviewers, etc.) who will be using the system or need to be listed in any drop-down lists for tracking purposes.

Meeting 8: Summary & Review (30 Minutes - 3 Hours*)

This session is designed as a review and working meeting for Visibility Software and the client and is the final implementation meeting. Based on the topics covered to date, this session may be used strictly as a question and answer session or it could be used to assist the client in finalizing various sections of the Admin setup. The goal is to resolve any questions that may have come up during the implementation process and to finalize the remaining tasks needed to transfer the system to the client's location.

Client Homework

Final Review

Client should take the last few days to finalize the system and do a last review. Generally, items to review would include deleting out any testing requisitions & applicants, resetting the requisition coding scheme to where the numbers should start, and signing off on the setup of the system in preparation for the transfer.

Meeting 9: Transfer of Data (1 - 2 Hours*)–This step does not apply for ASP clients

After the system is approved and all sign-offs are completed, a representative from Visibility Software's development team will work with the Client's IT Contact to transfer the web pages and the SQL database from the Visibility Software server to the client site.

Meeting 10: Connectivity Meeting (1 - 2 Hours*)–This step does not apply for ASP clients

After the transfer is completed, ideally later that day, the HR Team and the Visibility Software Project Manager will do some high level testing.

Items to be reviewed:

- Changing necessary links in Admin
- Put a requisition through
- Put an Applicant through
- Test Email

The Client determines the definition of going "live", whether that is allowing manager access, posting the jobs to the external website or using the tool internally. Ultimately, the Client has the final say on how the product is used from this point forward. Once the initial testing is completed, Visibility Software will send the System Acceptance Sign-Off – this signifies the implementation project is complete and Visibility Software will act in a technical support role from this point forward.

PHASE 2: Internal Staff Training

Client will develop two trainings for internal staff. The first will be a general overview of Cyber Recruiter, why to use it and basic navigation. The second will be focused on specific actions to take in the system – requesting a new requisition, evaluating applicants, communicating with the HR staff. Goal is to get 90% of staff through this training in the first 30 days after the data transfer.

PHASE 3: Activate Public Website

This phase will be in two stages. The first stage will be to work with the IT department to re-direct the corporate website to the new careers site to begin posting jobs from Cyber Recruiter and capturing applicant data via the online application process. The second stage will be to roll out the Self Service module to the existing employee staff so they can update their resume, experience and skills and apply to new job opportunities. Goal is to publish the website in the first 15 days after the data transfer and train all employees in the first 180 days.

PHASE 4: 6-Month Checkup

Client will utilize the on-demand training sessions as needed to review various items about the system which may or may not have been covered during the implementation. A meeting will be scheduled with Visibility 120-180 days after data transfer to touch base and be able to have questions answered, work on reports, etc. Outside of this meeting, the client will use the technical support portal and various documents to research questions or obtain assistance.