

Cyber Recruiter Express Implementation Overview

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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 to 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 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.

The idea behind an "Express Implementation" is to ensure a client has proper training on the daily usage of the Cyber Recruiter product. This process is designed to be quick and will use a "best-practices" configuration which allows the client to quickly get starting using the software. This implementation does not cover training on the administrative section of Cyber Recruiter outside of the key elements necessary to make the system unique to the client (namely the organizational structure and the users of the system). This allows the client to use the software and then make decisions about the configuration. It is recommended that a client choosing this method plan to work with a consultant 6-12 months after the original implementation to go over any configuration which they may wish to change after using the system.

Configuration can be changed by the client at any time. The On-Demand Training library is available for review by the client to help explain how to make modifications to the setup screens available in the Admin section.

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. Visibility Software's main focus and the SOW are designed to help clients through the first phase of rollout for Cyber Recruiter. Depending on a client's specific needs Visibility may be engaged to assist in additional phases including training hiring manager and/or rolling out to additional staff at an additional cost. Phase 1 typically takes 30 days.

* 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

Pre-Meeting Tasks

Meeting 1: Meet & Greet

Meeting 2: Requisition Training

Meeting 3: Applicant Training – Evaluation

Meeting 4: Applicant Training – Hiring

Meeting 5: Summary & Review

Meeting 6: Transfer of Data & Connectivity Meeting (Not for ASP clients)

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.

Review Navigation On-Demand Training (7 Minutes)

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

Review Resource On-Demand Training (10 Minutes)

This on-demand training reviews the 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 & Global Settings (1-2 Hours)

This will be the first meeting of the implementation team and is broken down into two sections.

The first section of the meeting is designed to provide introductions, to discover expectations, to determine additional needs or requirements not discovered in the sales process and to set a timeline.

The second section of the meeting will focus on the global settings which need to be set prior to bringing training. The consultant will use the standard system to explain what types of data will be needed prior to beginning training during the next meeting.

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
- Project Timeline
- Data Needed to Get Started (Organizational Structure Organizational Codes, Recruiters, Managers)
- Website Template

Client Homework

Send Over Required Data

Send over the necessary data which will be loaded by the Visibility consultant for the items identified (specifically, organizational structure and users)

Send Over Website Template

Provide the Visibility consultant with a website template which can be used for the corporate careers site.

Review Best Practices On-Demand Training (16 Minutes)

This on-demand training reviews the system and walks the viewer through using the system based on a 'best-practices' method. This will give the viewer an understanding of the software and will prepare the viewer for the remaining training.

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 any notes of questions he/she has regarding the process.

Visibility Software Homework

Load Settings

Based on data provided, load in the organizational structure, organizational codes, recruiters and managers of the system.

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

This session will focus on understanding the Requisition portion of the system. The Visibility consultant will review adding in a requisition and answer any questions which arose from the homework assignment. In addition, visit to the corporate website and recording details related to the requisition which may occur during the recruiting process will also be reviewed.

Client Homework

Add Requisitions

The client will start add all current requisitions into the system via the standard requisition creation process to practice this skill.

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 3: Evaluating Applicants (2 - 3 Hours*)

This session will focus on understanding the Applicant portion of the system. The client will have gone through the websites which Applicants will view and will have made notes on questions regarding the site. This session will start with a question and answer discussion of this section. Additional topics will include 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.

Client Homework

Add Applicants

The client will start add all applicants connected to currently open requisitions into the system via the standard pages or using the import tool.

Meeting 4: 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

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.

Meeting 5: Summary & Review (30 Minutes – 90 Minutes*)

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 6: 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.

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.