

Name: _____

Phone: _____

Idea Lab

The Biggest Decision of Your (Operations) Life—How to Purchase the Right Software for Your Firm

Dane Reese, CSP
Founder and CEO
PeopleAxiom
peopleaxiom.com

Wednesday, Oct. 28
1:15–1:45 p.m.



ASA
American Staffing Association

Idea Lab: The Biggest Decision of Your (Operations) Life—How to Purchase the Right Software for Your Firm


Dane Reese, CSP
Founder and Chief Executive Officer
PeopleAxiom

Wednesday, Oct. 28, 1:15–1:45 p.m.



0.5 CE

ASA
American Staffing Association



Dane Reese, CSP
Founder and Chief Executive Officer
PeopleAxiom

ASA
American Staffing Association

Agenda

- Staffing and Technology Overview
- Software Selection Methodology
- It's All About the Requirements
- Final Considerations and Terms
- Successful Implementation



American Staffing Association

Staffing and Technology Overview



American Staffing Association

Staffing and Technology

- Staffing firms are exceptionally dependent on technology but don't necessarily recognize this fact
- Staffing companies are constantly faced with the need to acquire or replace software applications, tools, and technology-enabled services
- With an ever-changing software landscape, it can be difficult to know how to shop for a staffing solution that fits into your staffing firm's environment



American Staffing Association

Typical Staffing Software Needs

Typical Staffing Firm Technologies

Front Office	Time & Expense Management	Payroll Processing	Billing	Accounting
Candidate Portal	Direct Email Marketing	Web Sourcing	Onboarding	Video Interviewing
Client Portal	Job Distribution	Email, Office Productivity, Chat	Background Checking & Drug Testing	Tax Updates
VMS / Supplier Portal	Job Advertising	Reporting Engine	Skill Testing	Social & Professional Networks
Parsing	Search & Match	VoIP	Websites & Website Analytics	Etc.



American Staffing Association

Core Staffing Systems

← Front Office → ← Middle Office → → Back Office →

Front Office	Time & Expense Management	Payroll Processing	Billing	Accounting
<ul style="list-style-type: none"> Customer relationship management Applicant tracking Portals Mobility solution 	<ul style="list-style-type: none"> Web time entry Web expense entry Overtime, etc. calculations Missing time management 	<ul style="list-style-type: none"> Payroll processing Garnishment management Pay delivery including direct deposit 	<ul style="list-style-type: none"> Invoice templates Invoice processing Invoice delivery 	<ul style="list-style-type: none"> Accounts receivable Accounts payable General ledger



American Staffing Association

The Integrated Front Office/Middle Office/Back Office Option

- Buying a point solution (front office only) may be a good option, but also consider a preintegrated staffing solution
- Integrating solutions from different suppliers can be more costly than preintegrated solutions
- Some integrated solutions are able to tie financial results to operational activities in real time



American Staffing Association

Software Selection Methodology



American Staffing Association

Mobilizing Your Software Selection

- Articulate your goals
- Establish the budget
- Establish how the decision will be made
- Form your selection team
- Agree on your methodology before you start



American Staffing Association

Articulate Your Goals

- Consider pain points, aspirations, and timing
- Sample goals:
 - Increase producer efficiency
 - Increase transparency into business performance
 - Reduce new employee ramp-up time
 - Reduce IT costs
- "Must be implemented by..."



American Staffing Association

Establish the Budget

- Not a zero sum game. If efficiency leads to more filled orders, the pie gets bigger
- Benchmarks
 - Start with current expense and be willing to add 20% of the gross profit margin of one more placement each month
 - Research costs of five staffing industry software providers
- Consider all costs (later slide)
- Look at costs that are eliminated or get consolidated
- Understand if subscriptions are pooled or one per user ID



Develop Decision-Making Structure

- Establish an internal governance structure
 - Executive sponsor, project sponsor, project owner, core team, extended team
- Establish the decision making process
 - Identify the *handful of key* decision-making factors
 - Create qualitative-oriented scorecards
 - Create quantitative scorecards



Form the Selection Team

- Crossfunctional
- Cover key process and operational variations
- Include both early technology adopters and laggards
- Process- and detail-oriented individuals
- Manageable number of core team members



Determine Selection Methodology

1. Document your business environment, differentiators, high-level process, pain points, and wish list
2. Shortlist three to five suppliers
3. Request basic demos (few hours, scorecard, key factors)
4. Identify finalists (two to three suppliers)
5. Drive process-scripted demos (day/days, scorecard, key factors)
6. Select supplier (first choice, second choice)
7. Plan implementation (for pricing and for mobilizing)
8. Finalize terms and sign the contract



American Staffing Association

Make the Decision Process Simple

- Define business requirements
 - Create spreadsheet
 - Define scoring:
 - Three points for must-have
 - Two points for differentiators
 - One point for nice to have
- "Create" RFP
- Calculate scores
- Distribute scoring results



American Staffing Association

It's All About the Requirements



American Staffing Association

It's All About the Requirements

- Client application vs. browser based
- SAAS / on-premises
- Front- / middle- / back- office
- Do you need this to be a sales tool?
- Do you need a VMS?
- What do you need in your client portals?
 - Custom reporting
 - Requisition management



American Staffing Association

It's All About the Requirements

- Do you need for time keeping?
 - Mobile
 - Overtime autocalculation by state
- Do you need an integrated job board?
- Supported devices, platforms, and operating systems



American Staffing Association

Know the Integrations

- Job board search and post
- Marketing automation
- Data import and export (candidate and clients)
- eForms with eSignature for onboarding
- VMS (timesheets and reqs from FieldGlass, IQN...)



American Staffing Association

Know the Integrations

- Timeclocks
- Reference checking
- Assessments
- Background screening
- Phone systems and SMS or text



American Staffing Association

In 2015, Search Is Key

- Sourcing tools (candidate and prospects)
- Check for existing before paying for views
- Semantic vs. Boolean
- Job board search automation (CB, Monster, Dice...)
- Search social media (FB, LI, Twitter, GitHub)
- Automated nightly search imports



American Staffing Association

How Configurable Is the App?

- What fields can be hidden?
- What field can be added?
- What workflows can be customized?
- What can be internationalized?



American Staffing Association

Reporting

- Interactive with drill down
- Predictive and strategic vs. operational
- Manage a desk, branch, client
- Supplier scorecards for clients
- Are customizations available in reports
- Business intelligence
 - Is data slicing and dicing available?
 - Are third-party visualizations integrated?



American Staffing Association

Database Development

- Do you get direct access to the database?
This applies to:
 - Reporting
 - Data imports
 - Data updates
- Determine if you or supplier develops.
Considerations:
 - Price
 - Turnaround time



American Staffing Association

Final Considerations and Terms



American Staffing Association

Try Before You Buy

- Hands-on
- Data capacity
- Look for performance
- Search, search, search
- Powerful features
- Simplicity in training
- Competitive differentiators



American Staffing Association

Negotiation

- Fixed price implementation
- Make sure the scope of work (SOW) is complete
- Price for report writing
- Price for development work
- Price for upgrades
- Price for training



American Staffing Association

Successful Implementation



American Staffing Association

Sell Your Technology Internally

- Stakeholders
 - C-suite
 - Board of directors
 - All employees
- Share supplier materials
 - Testimonials
 - Win/loss stats
 - Competitive field analysis
 - Strategic vision and roadmap



American Staffing Association

Implementations and change are hard.
Stick it out.
Make everyone uses the new system...
no exceptions!
The right decision will pay
dividends for years.



American Staffing Association

Questions?



American Staffing Association

Thank you for attending this
Staffing World 2015 Idea Lab



Dane Reese, CSP
Founder and Chief Executive Officer
PeopleAxiom
