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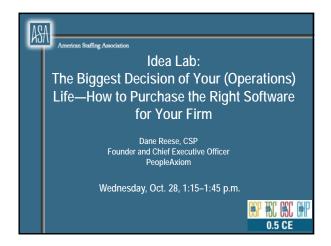
Idea Lab

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

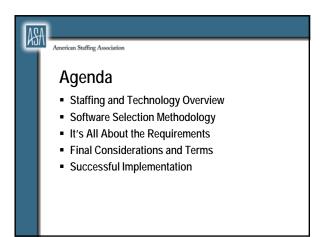
Dane Reese, CSP Founder and CEO PeopleAxiom peopleaxiom.com

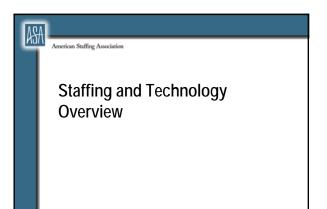
Wednesday, Oct. 28 1:15–1:45 p.m.









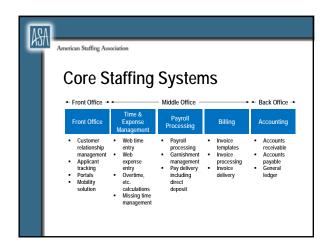


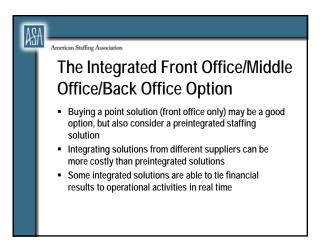


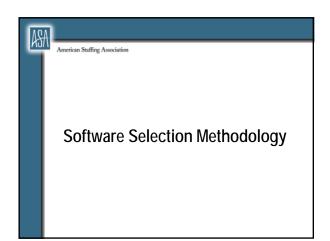
Staffing and Technology

- 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











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



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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..."



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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



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Form the Selection Team

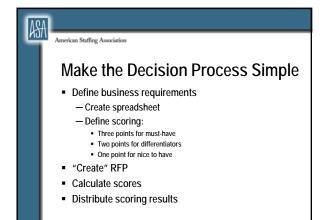
- Crossfunctional
- Cover key process and operational variations
- Include both early technology adopters and laggards
- Process- and detail-oriented individuals
- Manageable number of core team members

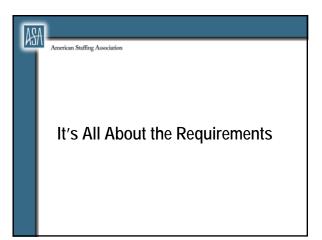


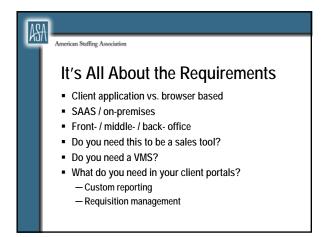
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Determine Selection Methodology

- 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)
- 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









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



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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...)



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Know the Integrations

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



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







