# **Applicant Tracking System Business Case Template**

**Use this free plug and play business case proposal template + an email template to send to a CFO for an investment in an Applicant Tracking System or other HR tech product. Pop in your details and present or send to your management team to set yourself up for success!**

Making a single great hire is probably a huge win for your business and arguably, as important as the biggest sales deal closed. But while leadership often speak about people being their most important asset, talent acquisition and people teams are still struggling to get budget for the tech they need to win over the best candidates.

We’re here to help with that.

First off, we’ve created a free plug and play template that you can use as a basis for presenting your case for investing in an ATS system for your organisation. You will use this to present to your case to the CFO or leadership team. The goal is to enable you to clearly convey why they should move forward now with an ATS solution in language that will resonate with budget holders.

This template will help you to:

* Define the hard cost savings for HR with an ATS, and how to effectively communicate this to management
* Explain the benefits of your proposed investment to the business
* Show how the project is linked directly to your team’s KPIs and greater business objectives
* Position your HR and Talent Acquisition team as a key component of organisational success
* Show you’ve done your due diligence by identifying potential challenges of the investment and how you’ll navigate them
* Help you get budget for the software you actually need, rather than the most cost-effective solution

In the coming pages we have completed all the sections of the template for a fictional company looking to invest in an applicant tracking system. Starting on the next page, update each section with the information that relates to your organisation or the type of HR tech product you’re planning to invest in.

Secondly, use the email template at the back to send to your CFO or leadership team, which also succinctly outlines your case for the investment.

Good luck from the team @**Occupop**.

**Applicant Tracking System Business Case**

For: [Organisation name]

Prepared by: [team member]

Date: [Date]

*[Throughout document edit the content in the brackets to suit your organisation]*

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**1. The challenge for HR**

Over the previous quarter, we’ve been analysing our current approach to hiring and we’re now at a point where we need to invest in a new recruitment software or applicant tracking system.

As a business we’re aiming to:

*[Edit for your organisation as appropriate]*

* Enter new markets through new offerings/products and grow top-line revenue X% (and, therefore, scale headcount by X%) in the next 12 months
* Make cost savings to improve EBITDA as we work towards a potential trade sale in the next 2 years

In support of this, over the next 12 months, our KPIs as a HR team are to:

*[Edit for your organisation as appropriate]*

* Fill X% of positions in under X time
* Reduce our reliance on external recruitment agencies by X%
* Reduce job advertising spend and automate job advertising administration at scale
* Build and improve our employer brand in the market
* Improve the gender diversity in our IT team by X%
* Improve our candidate experience throughout the interview process, reduce time to hire by X days
* Bring project-based teams together and enable better collaboration
* Build our applicant pool and influence inclusion starting with an unbiased selection of diverse new hires

In a post COVID-19 market for talent the competition for the best of those remains at an all-time high. As a result, we’re struggling to:

*[Edit for your organisation as appropriate]*

* Attract enough good fit candidates fast enough
* Not be able to act quick enough on good fit candidates, reduce our time to hire
* Collaborate on recruitment, now with our new remote working policy and dispersed hiring teams its more and more difficult for the HR team to keep everyone on track on progress and move the process forward
* Take advantage of being able to recruit anywhere in our time zone because of our new remote work policy
* Improve offer acceptance rate (partly because we’re not offering a compelling candidate experience, partly because we’re not moving fast enough)
* Give sufficient attention to improving diversity, HR team is very time poor with a lot of admin work
* Give more time to developing and building out recruitment marketing function and employer brand initiatives

**2. How a new Applicant Tracking System will help us solve our challenges**

Think of an Applicant Tracking System (ATS) as the equivalent of a CRM for the sales team. It’s the recruitment software hub where all the hiring team manages and has complete oversight over the entire recruitment process — from running recruitment ads to scheduling interviews, see current stage for open jobs in the recruitment process, managing the selection process and making offers.

For **[Company Name]** a new ATS will enable us to:

**Attract better candidates by:**

* Providing a system to centrally manage employee referrals and encourage our existing team to make those referrals.
* Enabling us to strengthen our reporting power and increase efficiency. For example, we can be using data to understand which recruitment marketing channels are most effective for each type of role.
* Improved remote hiring productivity and collaboration.
* Developing a new careers website that better highlights why a candidate should consider a career with **[Company Name],** makes it easier for them to apply, its mobile friendly, and bolsters the **[Company Name]** brand in the market. We’re expecting to see a significant improvement in the conversion rate of website visitors to the talent applicant pool as a result and expect the quality of those applicants, and therefor quality of hire, to improve.
* Giving us direct access to hundreds of niche job boards without lots of manual work, one click posting.
* Reducing the recruitment cycle and time-to-hire through streamlining the recruitment cycle, automation and helping to maximise productivity.
* Enable us to embrace the power of networks on social media. Our employees can easily post and share open roles boosting out employer brand in the market.
* Improved employer branding efforts through a polished look for all collateral and communication that relates to recruitment, assures candidates that your business is established, professional, and trustworthy.

**Reduce the time spent on manual tasks and speed up the recruitment process by:**

* CV scoring means we are able to rank candidate suitability on application, this means we get to engage the most suitable candidates first and shortlist 50% faster
* Managing all of our candidates in one central place (rather than across multiple job boards, LinkedIn, different inboxes, spreadsheets in multiple locations and so on)
* Giving hiring managers direct access to review candidate profiles as soon as they’re approved for review.
* Making it easy to collect and manage hiring manager feedback in one central system.
* Improve collaboration and easily involve relevant people in the hiring process. We typically have multiple people or departments involved in the hiring process. An ATS software offers a collaborative space to evaluate applicants, offer feedback and move applicants through the process easily.
* Automating the interview scheduling process (which typically now takes us 6-10 emails per interview scheduled).
* Cutting out all manual reporting and enabling us to schedule our regular reports to be sent to the right people, automatically.
* Giving us the ability to run recruitment advertising campaigns across multiple channels in just one click.
* Automate GDPR and data privacy compliance, save on legal costs, protect from audit’s and secure all candidate data.
* Maximise HR Team efficiency as we reduce the amount of recruitment administration, an ATS will give our HR staff back time to focus on the more important HR tasks and potentially reduce the need for further HR team staffing.

**Give the candidates we’re attracting a better experience:**

* The single biggest improvement here will be the new careers website where candidates will be able to self-serve information. We expect to see a significant improvement in candidate quality too.
* A simple mobile-responsive application form without a requirement for candidates to create a user account will increase the number of website visitors that apply.
* Automatically keeping candidates in the loop about the progress of their application using templated emails and tailored messaging sent automatically, for a much more personalised recruitment experience.
* Getting us access to the data we need to identify inefficiencies and issues in the recruitment process (including running a candidate survey at the end of each recruitment cycle that will give us data to track the progress we make improving our processes over time).

**Reduce reliance on recruitment agencies:**

A combination of all of the above will enable us to reduce reliance on recruitment agencies and recruitment adverting spend (conservatively by X%) by attracting more of the right candidates direct, giving them a better experience, and freeing up our own time to focus more on direct hiring through automating manual processes.

This will enable us to build our talent pipeline (and our own employer brand) meaning we’ll be able to hire from an existing database of candidates in some cases, and where do have to go out to market we’ll find it easier to attract the right candidates quickly.

**3. Project Risks**

No software project is without its risks, and we’ve taken care to identify the main risks and put mitigation in place to address each. By choosing the right vendor, we’ll reduce the amount of work required by our own team and reduce the risk of the project.

**Integration with existing systems**

We will require integrations with the following systems and have confirmed with our preferred ATS vendor, and each of our existing vendors that the integration can be delivered within the proposed budget and timeline:

* **[HRIS Vendor Name]** – HRIS – One-way push of hired candidate data from the ATS to a new Employee record in the HRIS
* **[Job Board Name]** – One click push of job data from the ATS to the platform

**Migration of existing data**

Today we have candidate data stored in spreadsheets. As part of the implementation process, the proposed ATS vendor will migrate this existing data to the new system.

**Use of internal resources**

This is a relatively simple project from an implementation standpoint. We’ve selected cloud-based software as a very configurable service platform, but doesn’t require bespoke development work or customisation to work for us.

That said, for the successful delivery of the project, we’ll need access to some internal resources.

Marketing

* To provide our brand assets to the ATS vendor so they can build our new careers website in line with our brand guidelines.
* To update the link from our main website to our careers page when our new careers page goes live.

Hiring Managers & Leadership Team

* Time with each of our hiring managers to train them in the use of the new system. This typically takes around 30 minutes and can be delivered by our team, or by the ATS vendor’s Customer Success Team. We propose that we’ll train hiring managers as and when they need access to the platform, rather than training everybody on day one.
* A 30-minute session with the leadership team to show them around the system and ensure they know where to find the things they need.
* IT owns the relationship with our HRIS vendor right now, and we may need them to connect the new ATS vendor with the HRIS vendor to discuss the integration of the two systems in more detail.

HR Team

* The HR Team will have the most work to do, the majority of which will be setting up the workflows and templates that we need in the system. We estimate that there will be 1 week of work for one person to do this and then another full week for one person to support the business over the first month that the new solution is live. This will be more than offset by the efficiency savings we’ll make by implementing the new system.

**4. Proposed Timeline**

Approval – by **[date]**

Contract Signed – by **[date]**

Implementation – from **[date]** to **[date]**

·   Careers page build

·   Create scorecard templates

·   Create workflow templates

·   Create communication templates

·   Set up job board integrations

·   Add open requisitions to the system

·   Invite users

HR Team Training - **[date]**

End User Training – from **[date]** to **[date]**

Data Migration – **[date]**

Go Live - **[date]**

HRIS integration go live - **[date]**

**5. Proposed Vendor**

**Vendors we assessed**

After reviewing X vendors that appeared to be a fit, we narrowed our selection down to X. We scheduled demos with those vendors, and we’re now in a position where we’ve made our final decision.

The final X vendors were:

* Occupop
* Vendor 2
* Vendor 3

**Our recommendation**

We recommend moving forward with:

Shape

Description automatically generated with medium confidence

See: www.occupop.com

While both of our top two had the features we need today, **Occupop** stood out for many reasons:

* Occupop has the most simplistic design and user experience of the systems we evaluated which will significantly reduce the learning curve for all of the users of the system, and make sure our candidates have a great experience too. All members of the hiring team can be up and running on the system in a couple of hours, limited training is needed. It also means non-technical hiring managers, those outside HR, are more likely to use the system.
* It’s designed specifically for small and medium businesses and can grow as we grow. There are multiple price points and flexible plans that work for businesses of any size and can scale as we do. It means its a good fit for our current growth stage and also into the future.
* They care a lot about candidate experience and will manage our careers website without needing lots of time from the marketing team or help from our external website development agency. There’s no extra cost for this.
* They’ll support us through the implementation process and we get unlimited access to their support team during and after implementation at no extra cost. Their average response time to support inquiries is 24 hours during business hours after implementation.
* Occupop’s built on modern technology, and they stay ahead of changes in the market — both in terms of what candidates want, but also recruitment best practice. There is a visible product roadmap available and constant enhancements to the product.
* They believe in an open ecosystem which means they’re actively want to integrate and partner with other HR systems. They already integrate with lots of different software vendors but if we need them to build an integration with a vendor they don’t already have an integration with in the future we can request that with them.
* The pricing is simple broken down by the number of active job listings we have each month. We pay one fee for unlimited usage. There are no separate implementation fees, support fees, integration fees, and we get unlimited access to new features and feature improvements at no additional cost.

Occupop is currently used by SMEs across Ireland, the UK like the Beacon Hospital, Boylesports, and BestDrive. You can read some of their reviews and case studies here:

<https://www.occupop.com/customer-stories>

**6. Return on Investment**

Occupop charges a flat fee for a minimum 12-month subscription paid annually in advance. This includes all implementation, training, support, the integrations that we need, and unlimited access to the features we need today (and any new ones they implement in the future).

As a result, we’ll need an up-front investment of **[amount]** but we expect to make cash savings of **[amount]** by **[date]** which will be achieved by:

* Decreasing the cost of sourcing by attracting more candidates for the same ad spend resulting in a saving of **[amount]** by **[date]**
* Decreasing spend with agency recruiters by increasing the efficiency of our in-house talent team resulting in a saving of **[amount]** by **[date]**
* Improving employee retention by attracting right-fit candidates, and setting expectations before they accept the offer
* Enabling us to delay the next hire into the talent team from **[current plan]** until **[new milestone]** representing a saving of **[amount]** over the next [**time period]**

**7. Next steps**

We’ve set up a meeting including **[names]** for **[date]** where we plan to discuss this proposal in more detail. We will then seek final sign-off from **[name]** to hit the project timeline proposed above.

# **CFO Email Template**

**Fill in your details in this email template and attach the previously edited Applicant Tracking Business Case Template. The goal is to clearly convey why they should move forward now with a recruitment software solution in language that will resonate with budget holders.**

Include your

1. Company name
2. Solution
3. ROI details

[edit examples provided in brackets for guidance]

*Hi [CFO Name],*

*In these uncertain times I’m very well aware that every penny counts, so I don't take my request lightly. Please find attached a business case detailed on behalf of the HR team for an investment in a recruitment software from [Occupop] that I think [organisation name] could really benefit from given today’s talent tight, remote first and uncertain economic environment.*

*I know your time is precious so I have detailed in brief below, how we can benefit from such an investment.*

*[Occupop] addresses three new key themes in the world we now live in which directly impact [organisation]:*

1. ***[Improved Remote Recruitment Productivity****: We have to develop new ways to measure, maintain, and improve recruitment productivity in this new environment where many of our hiring managers are dispersed to ensure we are hiring the best and building the best teams. Recruitment is all over the place, rather than in one place and we are increasing administration and decreasing efficiency as a result. ]*
2. ***[Enhanced Job and brand visibility:*** *As we compete on the talent market with similar brands, we need to make every effort to stand out as an employer of choice. Lack of open job visibility, a talent pool and fresh and updated company careers pages is leading to decreased applications and hires for key roles. ]*
3. ***[Increase Agility:*** *In a tight, hyper competitive labour market responding quickly to candidate applications and bringing them through the recruitment process quickly and effectively is a huge challenge, and its very difficult to keep the hiring team on course and aligned. ]*

*We have identified [Occupop] as the best technology solution to address these issues head on:*

*[Occupop] is a Recruitment Software built for small and medium businesses looking for a simple solution to automate and streamline the recruitment process. This [gives us visibility/reduces cost] to:*

* ***Productivity of our team*** *as they work from home is top of mind. No other tool can give us [\*detail how your team makes you more effective, saving cost/resources].*
* ***Visibility****. [Occupop] can quickly pinpoint our most successful recruiting channels [\*detail where visibility is lacking and the negative impact it’s causing].*
* ***Agility****. With this investment, we’ll be able to [\*detail how [Occupop] will enable them to move and adapt faster and the outcomes it will produce].*

*[Occupop] is being used by companies similar size to us like the Beacon Hospital, BestDrive and Boylesports to do the above with very positive* [*reviews*](https://www.occupop.com/customer-stories)*.*

*We are looking at an investment €X, which would cover and equip our entire [function / organisation]. In the new business environment we live in, this technology is even more critical.*

*In the past, we would invest in [budget line item, like career fairs for example] expenses to help drive [applications for open roles]. Since we’re no longer using [budget line item] budget due to our new remote working environment, I’d ask that we repurpose a small portion of my [budget line item] spend to cover [Occupop’s] cost, as it's the new [budget line item] for organisations that are working remotely. We believe that [Occupop] will help us reduce [budget line item] costs even in a post pandemic world.*

*Alternatively, I am willing to give up on [1 head count per 20 people], which would pay for the investment in [Occupop].*

*Let me know if you have any questions, happy to provide more detail if required.*

*[Employee name].*