



RECRUITING AUTOMATION VENDOR Evaluation checklist

VENDOR

NAME

ACCOUNT EXECUTIVE

RECRUITING AUTOMATION
CATEGORY

Customer Success/Support & Training

- ☐ Offers customer success/support
- ☐ Self-service training solutions
- ☐ Technical troubleshooting (web / phone help)
If yes: Avg. Response time: _____
- ☐ How robust is their customer success team? Is this inadequate when it comes to providing the level of support and change management required for a company your size?
- ☐ Experience working with F500 customers
- ☐ High turnover rates that could cause support-risk

Cost

- ☐ Pricing model clear and transparent - no hidden costs
(Question to ask: Too good to be true? What's the catch?)

Talent

- ☐ Experience working with Enterprise-level customers
- ☐ Enterprise-ready while at the same time full understanding of the needs of smaller organizations.
- ☐ High CEO approval ratings -- Is the company at risk from leadership change?

Artificial Intelligence and Machine Learning

- ☐ Questions to ask:
What exactly do they automate?
Who leads their Product Department? What are their AI credentials?
Do they hold any patents tied to ML/Artificial Intelligence?

Diversity:

- ☐ Offers actionable, real-time Individual and org reports (gender and ethnicity) that show both diversity sourcing and the resulting breakdown of the recruiting team's pipeline.

Security

- ☐ Diversity filters compliant both in the US and Abroad
- ☐ GDPR compliant -- Are they Data Controllers or Data Processors?
- ☐ EEOC compliant

- ☐ Publicly available privacy notice
- ☐ SOC2 Type II compliance
- ☐ Sky-High Enterprise Ready certified
- ☐ Secure APIs
- ☐ Meet ISO 27001, PCI and FedRAMP global security standards
- ☐ Comprehensive disaster recovery plan
- ☐ Vulnerability testing measures in place
- ☐ Questions to ask:
 - How will they protect your data?
 - Are their APIs secure enough for you to approve ATS integrations of your most important data? (people) using TLS 1.2? Do they leverage AES 128-bit encryption?
 - Do they also use KMS encryption of your data? Can they be exported from the service?
 - Do they store passwords, can they SEE your passwords or do they use one way cryptographic hashing algorithms (Bcrypt - the industry standard for password hashing)
 - Do they provide phone numbers? (FICRA red flag)
 - Can recruiters sign up and install the software on company-issued computers without any level of review? OR does it require corporate approval to ensure the software is safe to install?
 - Can they speak towards how they are committed to protecting privacy, confidentiality and security?
 - Can they confirm that PII from your applicants will NEVER be available to others?
 - Does the contract you are being presented include clauses about the vendor's ability to access YOUR contact books and automatically add those to the database?
 - How do they keep customer data safe?
 - Can they help you prepare for an OFCCP audit?
 - Track and monitor your team's activities to ensure diversity searches are being performed by each sourcer/recruiter?
 - Can they speak towards the proportion of your represented to under-represented candidates in your pipeline?

Integrations

- ☐ Ability to integrate with Enterprise-grade ATS/CRM solutions -- Are there any hidden costs?
- ☐ ATS/CRM configuration and implementation services
- ☐ Able to scale and grow with YOUR organization

Technology

- ☐ Questions to ask:
 - How many data sources does it aggregate?
 - Do they have Industry-specific data sources? (finance, healthcare, etc)
 - Is this a tech-company or a sales-oriented organization? How does that impact their vision of customer service and product roadmap?
 - Do they only have quarterly product release cycles or are they constantly innovating and working to improve all aspects of the product?

Sourcing

- ☐ More than 500million candidates
- ☐ Ability to request contact information if it's not already available
- ☐ Ability to search using multiple languages and special characters
- ☐ Advanced search filters to encourage efficiency
- ☐ Proprietary actionable insights accompanying resume data
- ☐ Outreach Insights to help you compose better messages, and other data-driven tips to increase response rates

Platform and Workflows

- ☐ Enables collaboration across recruiters, recruiting managers and recruiting managers without additional cost/licenses.
- ☐ Admins can easily manage and swap user seats
- ☐ Configurable to meet the needs of my entire team (vs. one-size-fits-all solution)
- ☐ Encourages staying in-browser - time saving
- ☐ Provides features my ATS/CRM does not have (i.e. ability to send emails on behalf of a hiring manager or a senior diverse leader at the organization)
- ☐ Provides access to candidates across all regions
- ☐ Continuous innovation and product development

Enterprise-ready

- ☐ Can demonstrate successful similar deployments?
- ☐ Testimonials from Enterprise-level customers
- ☐ Questions to ask:
 - What types of enterprise clients, with high levels of expectations, security and privacy concerns are currently using them?
 - Testimonials - do these reflect multiple industries and company sizes - or just one?
 - What do the strongest Talent Acquisition companies have to say about their technology, product and services?