



THE NEXT WAVE OF  
**CRM**

DESIGNED FOR THE MODERN RECRUITER

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## INTRODUCTION

The talent acquisition landscape is growing in complexity, and Candidate Relationship Management (CRM) solutions continue to take center stage as a critical element in the modern technology stack. According to Aptitude Research, 76% of enterprise companies use or plan to use CRM to support their recruitment efforts. To remain competitive in talent acquisition across industries, companies recognize the importance of engaging with individuals before they apply for a job.

Investing in a CRM presents significant advantages for companies, enhancing the effectiveness of their talent acquisition and improving the recruiter experience.. These systems empower organizations to extend their reach, improve the candidate experience, boost conversion rates, and strengthen their brand.

The potential and opportunities offered by CRM are immense; however, the reality is that many companies fail to recognize its value. Surprisingly, only one in four companies express high satisfaction with their CRM providers, and only 15% would recommend their CRM to another company. This glaring disparity reveals a significant gap between the potential capabilities of CRM and the actual value it currently delivers.



According to Aptitude Research

**76%**  
of enterprise  
companies use or  
plan to use CRM  
to support their  
recruitment efforts.

## The current state of the CRM market has three fundamental challenges:



### Adoption:

Companies often find themselves overspending on CRM capabilities that are not adopted. The investment in functionality that is never used contributes to an inefficient allocation of resources. Currently, 61% of companies spend more on their CRM than on their ATS.



### Recruiter Experience:

A critical challenge lies in the fact that those purchasing CRM are not the same individuals using it. The traditional CRM is not tailored to support the workflow or enhance the experience of recruiters. This misalignment leads to a disconnect between user expectations and system capabilities.



### ROI Measurement:

Companies face a critical issue in not effectively measuring the Return on Investment (ROI) of their CRM. The lack of robust evaluation metrics hinders organizations from understanding the true impact and value derived from their CRM implementation. Only one in two companies measure the ROI of their CRM investments.

These challenges have created frustrations for both buyers and traditional providers that are not able to support customer needs. Fortunately, the CRM market is shifting. Traditional players are expanding their capabilities beyond talent acquisition, while a new wave of providers is entering the market with the goal of providing more cost-friendly options that meet the needs of the modern recruiter. New entrants to the CRM landscape are leveraging artificial intelligence (AI) and machine learning (ML) to vastly improve sourcing, engagement, communications, analytics, and reporting.



# 61%

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The goal of this report is to help address the current challenges with the CRM market today and highlight a more effective option for companies looking for greater simplicity, improved recruiter and candidate experience, and higher adoption.

**This report will help to answer the following questions:**

- ▶ What are the prevailing trends in the CRM market today?
- ▶ What are the challenges companies face with selecting and implementing these systems?
- ▶ What is the difference between a traditional CRM and a Recruiter CRM?
- ▶ How can companies calculate the Return on Investment (ROI) of their CRM investment?
- ▶ What key messages should companies communicate with key stakeholders?
- ▶ What are the crucial questions to ask during the selection, implementation, and change management phases?

As organizations navigate the evolving landscape of talent acquisition, understanding and leveraging CRM emerges as a pivotal strategies. This report aims to provide organizations with the insights and guidance needed to make informed decisions, ensuring the successful integration and optimization of CRM systems for the modern recruiter.



**Quantitative Research:**

400+ responses for TA and HR VP Level,  
Recruiters/Sourcers, and IT Professionals.

**Company Sizes:**

- 18% (250-999ees)
- 22% (1,000-4,999ees)
- 28% (5,000-9,999ees)
- 32% (10,000ees+)

**Qualitative Research:**

Interviews with TA and HR leaders in  
2023 and 2024



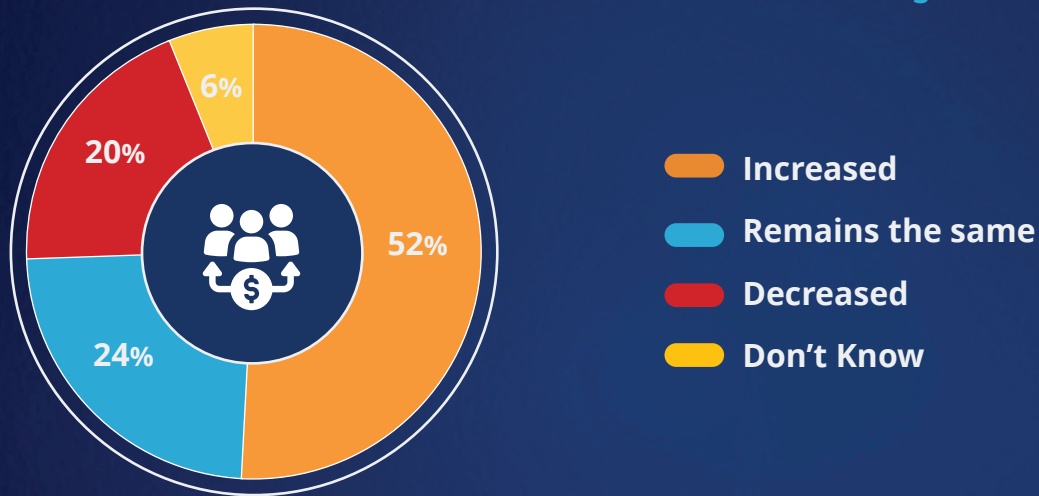
# TOP CHALLENGES: THE OLD WAY IS NOT WORKING



The CRM market is one of the most misunderstood markets in HR technology. As companies look to transform their talent acquisition strategies, finding a trusted partner can be challenging, with new providers entering this market and traditional providers reinventing themselves.

According to Aptitude Research, 76% of enterprises are investing the same or plan to increase their investment in traditional CRMs this year (See Figure 1).

**Figure 1:** Investment in CRM



 aptitude  
research

Even with this continued demand for a CRM, companies are not happy. Only 25% companies are very satisfied with their CRM and only 15% of recruiters would recommend their CRM.

**Additionally, Aptitude Research found that one in three companies are looking to replace their CRM this year.**

**Below are some of the key trends influencing recruitment marketing decisions today:**

1

**Low Adoption:** Adoption is the greatest challenge when investing in CRMs. Companies invest in these platforms but often do not support implementation, training, and change management. CRMs can be incredibly overwhelming for users, and many companies struggle with adoption when they do not have pre-defined use cases. According to Aptitude Research, only 14% of companies stated that their recruitment teams are adopting CRMs once they invest, and 2% of companies said that they are using all the functionality in these platforms.

2

**Market Churn:** As companies struggle with adoption, they quickly become dissatisfied with their current providers. Aptitude Research found that CRMs are among the top three areas of replacement in talent acquisition technology today even above companies looking to replace their ATS. Many second and third generation buyers are evaluating new platforms or are unhappy with their current providers. This level of customer churn is unusual for a market that did not exist ten years ago. Changing providers can be costly and erode confidence in talent acquisition technology decisions. Companies should consider which providers can support their needs for the short-term and long-term.

3

**Trusted Partnership:** For organizations to see results from an investment in CRM, they must work with partners who can understand their unique requirements and are transparent about their product roadmap, price, and support. Many providers are increasing the costs of these systems and including multiple add-ons in the RFP process that customers are not considering. Companies should evaluate providers with demonstrated expertise and staying power in this market.

4

**Shifting Budgets:** Companies considering CRM do not necessarily need to find a new budget for their investment. As talent acquisition becomes more complex, companies invest in up to 10 different talent acquisition solutions and three primary sourcing solutions. Companies that go through an exercise of determining what solutions are ineffective can help to free up the budget for a CRM solution.

5

**Talent Audiences:** To optimize the effectiveness of CRM, companies need to consider the audiences that they are targeting carefully. Talent audiences and personas are an important part of how companies think about their technology partners. Teams investing in a CRM tool should consider how these solutions can support these audiences with personalized messaging, content, and communication.

6

**Key Metrics:** The metrics and data measured from a CRM solution is different from an ATS. In addition to the traditional recruitment metrics such as time-to-fill and cost-per-hire, users of recruitment marketing platforms should measure conversion rates, source of influence, source of hire, and candidate engagement.

One additional challenge is that traditional CRMs create disjointed experiences. When not implemented or used effectively, they can inadvertently create disjointed experiences for both recruiters and candidates. Here are some examples:

#### **Communication Gaps:**

If the CRM system is not integrated with other communication tools or channels, recruiters might miss important updates or messages. For instance, a candidate's recent interaction with the company through social media, SMS, or email may not be reflected in the CRM, leading to inconsistent information and potential miscommunication.

#### **Lack of Integration with Other Systems:**

If the CRM system is not seamlessly integrated with other HR and recruitment tools, recruiters may have to switch between multiple platforms to access essential information. This disjointed workflow can slow down the hiring process, decrease productivity, and create frustration for both recruiters and candidates.

#### **Limited Accessibility:**

If the CRM system is not mobile-friendly or lacks accessibility features, recruiters might face challenges in accessing and updating candidate information while on the go. This limitation can result in delays in response times and hinder the ability to engage with candidates in a timely and effective manner.

#### **Failure to Track Candidate:**

If the CRM system does not consolidate various touchpoints such as emails, social media, and application portals, recruiters may miss out on valuable insights.



# GETTING BACK TO BASICS: UNDERSTANDING CRM



The CRM is a complicated technology platform. For companies to see value, they must truly stay focused on what business challenge they are trying to solve and how the technology can help recruiters identify and attract talent more effectively.

At the core, the goal of CRM is to nurture, manage, and enhance relationships between organizations and potential job candidates throughout the talent acquisition process. It serves as a central hub for storing, organizing, and leveraging candidate data, enabling recruiters to build and nurture relationships with individuals who may not be immediately applying for specific job openings.

## Key capabilities of a Candidate Relationship Management system include:



### Candidate Database:

A centralized repository for storing candidate profiles, resumes, and relevant information, allowing recruiters to easily access and manage candidate data.



### Engagement Tools:

**Campaigns (Text, SMS):** Tools for launching targeted campaigns through text messages and SMS to engage candidates with personalized communication.

**Events:** Functionality to plan, organize, and manage recruitment events, including webinars, job fairs, and meet-and-greet sessions, fostering in-person or virtual interactions with potential candidates.



### Sourcing

Features to support proactive sourcing of candidates, allowing recruiters to identify and attract talent from various channels, including social media, job boards, and professional networks.



### Talent Pipelines:

The ability to proactively build and manage talent pipelines by segmenting candidates based on skills, experience, and other criteria, ensuring a pool of qualified individuals for future hiring needs.





### Candidate Communication:

Tools for personalized communication with candidates, encompassing email campaigns, SMS, and other messaging methods to maintain ongoing and meaningful connections.



### Analytics:

Reporting tools that provide insights into candidate interactions, campaign performance, and other key metrics, facilitating data-driven decision-making for continuous improvement.



### Workflow Management:

Streamlined workflows that support recruiters in managing various stages of the candidate lifecycle, from sourcing and initial contact to application, interview, and eventual hire.



### Automation:

Automation of routine tasks, such as sending follow-up messages, updating candidate records, and managing event logistics, to enhance efficiency and maintain consistency.



### Integration:

Seamless integration with other recruitment and HR systems, such as applicant tracking systems (ATS), to ensure a cohesive and unified approach to candidate data across different stages of the hiring process.



### Candidate Experience Enhancement:

Features aimed at improving the overall candidate experience, including timely updates, transparency about the recruitment process, and personalized communication through different channels.



### Microsites or Landing Pages:

Features to attract talent and collect candidate information.



### Applicant Screening:

Capabilities to effectively assess and identify candidates whose skills and qualifications align with the organization's requirements.



### Candidate Engagement:

With interactive communication features and automated outreach campaigns, the CRM fosters meaningful candidate engagement, ensuring a personalized and responsive interaction throughout the recruitment lifecycle.

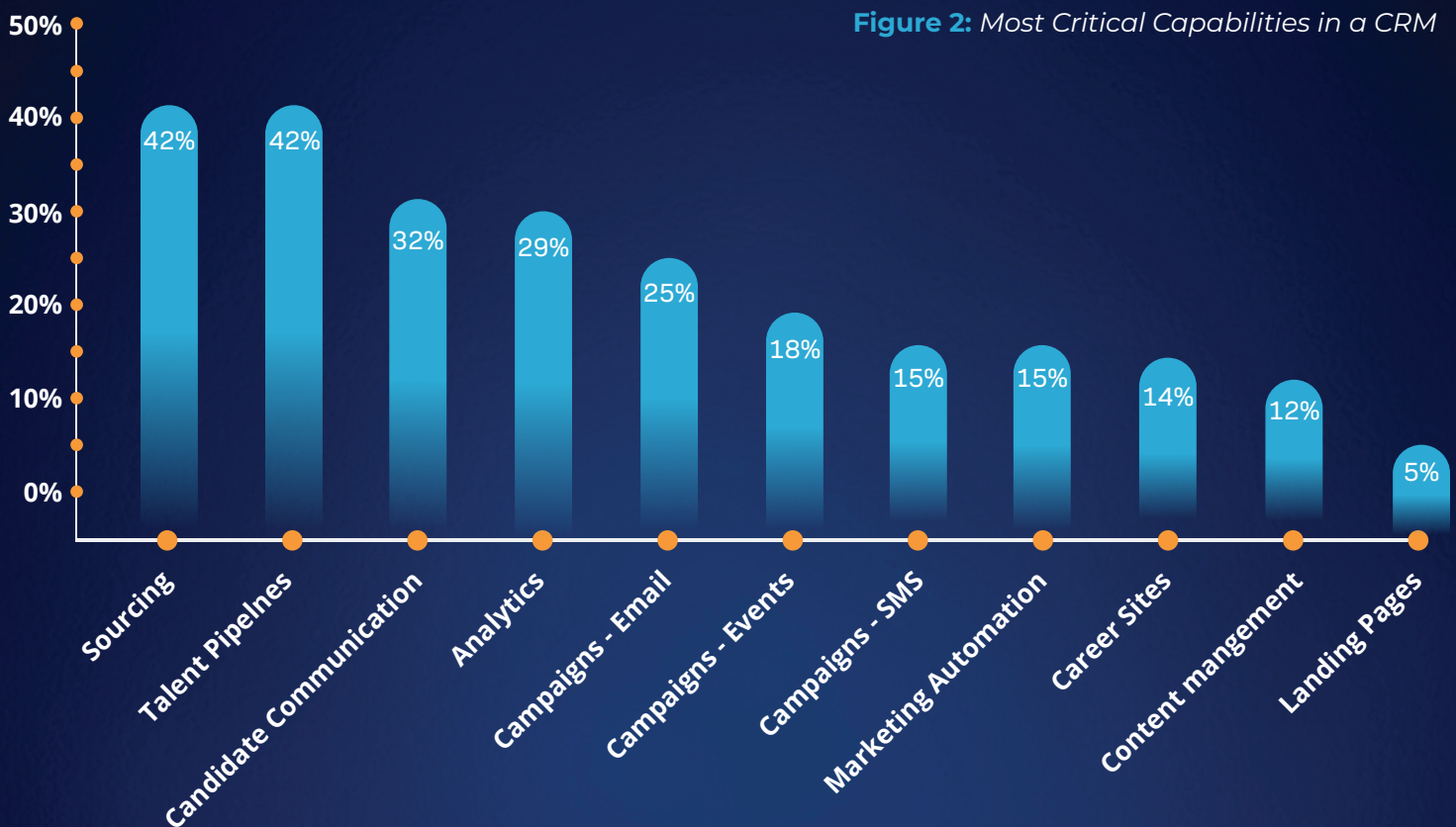


### Talent Pool Creation:

The CRM facilitates strategic talent pool creation by centralizing and categorizing candidate data, empowering recruiters to proactively source, nurture, and manage talent.

Career sites are often included in a CRM purchase but not all CRM providers offer career sites and not every company invests in both from the same provider. A career site provides information about job opportunities within that organization. It serves as a central hub for individuals seeking employment to learn more about the company's culture, values, available positions, and the application process. Career sites are designed to be user-friendly, offering a seamless experience for job seekers to explore and apply for open positions.

When asked what the most critical capabilities are in a CRM tool, companies stated sourcing and talent pipelines above all else. This signifies a move back to the basics and a need for greater simplicity. Companies want to identify and attract talent in one platform.



A CRM solution with these capabilities empowers organizations to not only manage candidate relationships effectively, but also to conduct targeted campaigns, organize events, source talent proactively, and maintain talent pipelines for future hiring needs. It serves as a strategic tool for building and nurturing relationships with potential candidates throughout their journey.

Unfortunately, many CRM solutions today do not include all these capabilities and more traditional providers are moving away from the basics into areas outside of recruitment. As the CRM market grows in complexity, it seems to move further away from the actual users of the system.

The following pages of this report will explore the new wave of CRM that is aimed at improving the recruiter experience.

# A NEW CRM: FILLING CRITICAL GAPS & ENHANCING RECRUITER EXPERIENCE

The CRM market has tremendous potential, but the way the providers are selling these solutions, and the way companies are implementing them does not drive real value. Recruiter CRMs are helping to address the challenges in this market and offering a better solution. These CRMs are characterized by the following:



**The CRM is a simple experience.**



**The CRM is designed for the recruiter.**



**The CRM drives ROI.**

**Figure 3:** *Traditional CRM vs. Recruiter CRM*

## TRADITIONAL CRM

- Limited Sourcing Capabilities
- Basic Data Storage
- Manual Communication
- Limited Automation
- Lack of Insights into Full Talent Funnel

## RECRUITER CRM

- Advanced Sourcing Capabilities
- Comprehensive Data Management
- Automated Communication and Tracking
- Task Automation
- Robust Analytics

## A Simple Experience, **Driven by AI**

The new wave of CRM providers is targeting the recruiter, providing an improved experience with simple capabilities, and outcomes. Recruiter CRM (RCRM) does three things well: sourcing, outreach (CRM), and analytics. It's a simplified model with capabilities designed to help recruiters find talent, engage and nurture talent, and track their efforts. It uses AI and automation to improve sourcing by helping companies nurture and engage talent more effectively.

**Sourcing:** Recruiters can leverage the platform to identify potential candidates through various channels, including job boards, social media platforms, and professional networks. AI helps recruiters discover candidates with the right skills and qualifications, ensuring a more targeted and effective approach to talent acquisition.

**CRM:** The CRM component of the system plays a crucial role in managing and nurturing relationships with candidates. Recruiters can maintain a centralized database of candidate information, including resumes, communication history, and feedback. Automated communication tools facilitate personalized interactions, allowing recruiters to engage with candidates at different stages of the hiring process. This not only improves candidate experience, but also strengthens the recruiter's ability to build lasting relationships with potential hires.

**Analytics:** Analytics is another integral part of the RCRM system, providing recruiters with valuable insights into their recruitment efforts. The platform offers data-driven analytics that help recruiters measure the effectiveness of their sourcing strategies, track candidate engagement, and assess the overall success of their recruitment campaigns. These analytics empower recruiters to make informed decisions, optimize their processes, and continuously improve their talent acquisition strategies.

**Figure 4:** Recruiter Driven CRM



### Sourcing:

- Identify candidates closely aligned to the job
- Match candidates to jobs



### CRM:

- Nurture and engage candidates
- Manage talent pipelines



### Analytics:

- Robust insights into candidate engagement
- Measure effectiveness of all talent attraction activities

## The Benefits of Integrating Sourcing and CRM solutions

Having sourcing capabilities in a CRM is important for several reasons, as it significantly enhances the efficiency and effectiveness of the talent acquisition process. Unfortunately, many companies do not integrate the two.

According to Aptitude Research,

ONLY  
**15%** of companies say their CRM seamlessly integrates with sourcing.

ONLY  
**31%** of TA leaders and HR leaders want one solution for sourcing and CRM

VS

**72%** of recruiters that want one provider.

Here are key reasons why sourcing is a crucial component in a CRM system:

**Proactive Talent Identification:** Sourcing allows recruiters to proactively identify and engage with potential candidates, even before they apply for specific job openings. This proactive approach helps in building a pool of qualified candidates for current and future hiring needs.

**Wider Talent Pool:** With sourcing capabilities, recruiters can tap into a broader talent pool by searching for candidates through various channels, including social media platforms, professional networks, and external databases. This widens the scope of potential candidates beyond those actively applying for positions.

**Reduced Time to Fill:** Sourcing enables a faster and more targeted recruitment process. By actively seeking out candidates with specific skills and qualifications, recruiters can reduce the time it takes to fill critical positions, contributing to a more agile hiring process.

**Building Talent Pipelines:** Sourcing is instrumental in building and maintaining talent pipelines. Recruiters can continually identify and engage with potential candidates, categorizing them based on skills, experience, and other criteria. This ensures a steady pool of qualified individuals for various roles, reducing the time and effort required for future hires.

**Better Quality Candidates:** Sourcing allows recruiters to focus on finding candidates who possess specific skills and qualifications, leading to a higher quality of candidates in the talent pipeline. This targeted approach improves the chances of identifying candidates who align closely with the organization's needs.

**Enhanced Candidate Relationships:** Sourcing is not only about finding candidates, but also about initiating and nurturing relationships. By proactively engaging with potential candidates, recruiters can establish a positive rapport, making candidates more likely to consider opportunities with the organization.

**Rediscover Talent:** Companies can rediscover talent in their ATS without having to manually search for candidates by engaging and nurturing talent frequently.

Aptitude Research found that companies that integrate sourcing and CRM from one provider see the following results (Figure 4).

**Figure 4:** *Impact of Integrating Sourcing and CRM*



**MORE LIKELY**  
to improve  
quality of hire



**MORE LIKELY**  
more likely to improve  
recruiter experience



**MORE LIKELY**  
likely to improve  
time to fill

## A CRM with the Recruiter in Mind

Technology plays a pivotal role in the recruiter experience. Not only does it influence where recruiters work, but it significantly improves their quality of life by saving time, reducing the administrative burden, and enabling recruiters to build stronger relationships with candidates.

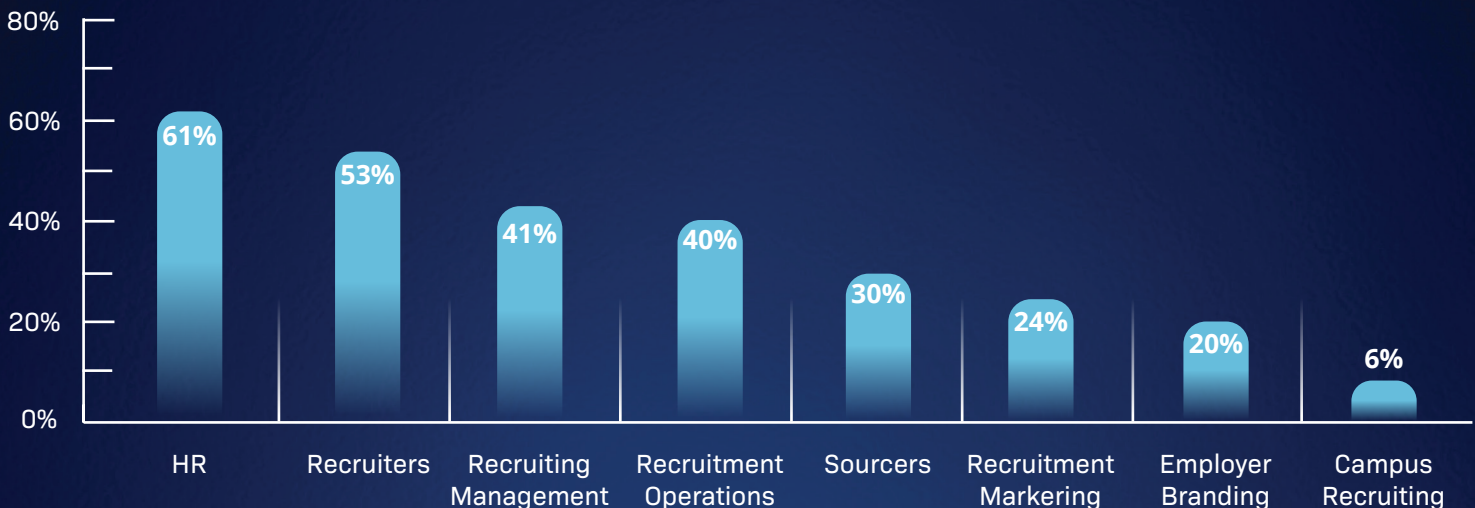
Ten years ago, the talent acquisition technology market was comprised of a few key providers offering stand-alone products in defined categories such as background screening, job boards, ATS, assessments, and onboarding. Today, the market has exploded with thousands of providers and new players entering each month. Additionally, the lines have blurred. Many of these providers offer several solutions in talent acquisition or have created new categories of technology, making the recruiter experience much more complicated.

But, as companies build more robust TA tech stacks to support their recruitment efforts, they have lost sight of the recruiter. They are looking at technology that will benefit the overall business and improve the candidate experience without always considering the user. Over the past few years, Aptitude Research has been studying the recruiter experience and found a significant difference between the vision that leadership has for TA technology and the solutions that help recruiters achieve success.

## Who Is Influencing TA Technology Decisions Today?

The disconnect between the technology that companies implement and the technology that drives value stems from a flawed decision-making process. Aptitude Research found that only 32% of companies stated that recruiters are involved in TA technology decisions and only 12% of sourcers and 20% of specialists are involved. This indicates that the individuals doing the recruiting are not providing input on the technology that companies use. Decision-making is mostly being done by TA and HR leadership and IT. When asked who is using the system, just over half said recruiters (see Figure 5).

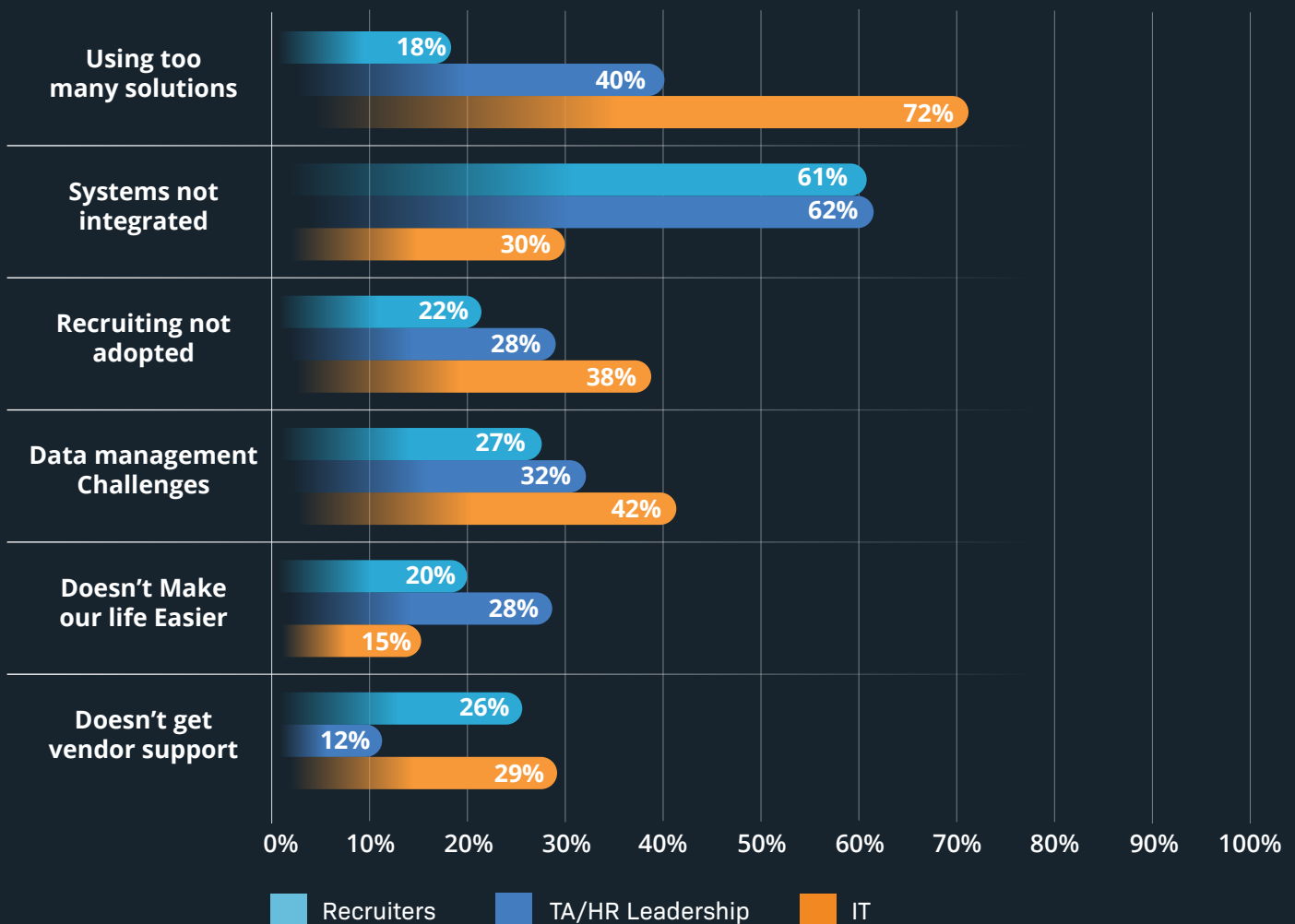
**Figure 5:** Influencer's usage of TA Tech



## What Are the **Greatest Frustrations with Technology?**

Once technology is evaluated and implemented, companies face several frustrations with using different solutions. Aptitude Research found that IT is primarily concerned with too many solutions in place and trying to reduce the number of vendors. HR and TA leadership and recruiters are concerned with integration and making sure they have consistency of experiences and data. This frustration with integration takes precedence over improving the quality of life and adoption.

**Figure 6:** Top Frustrations with TA Tech

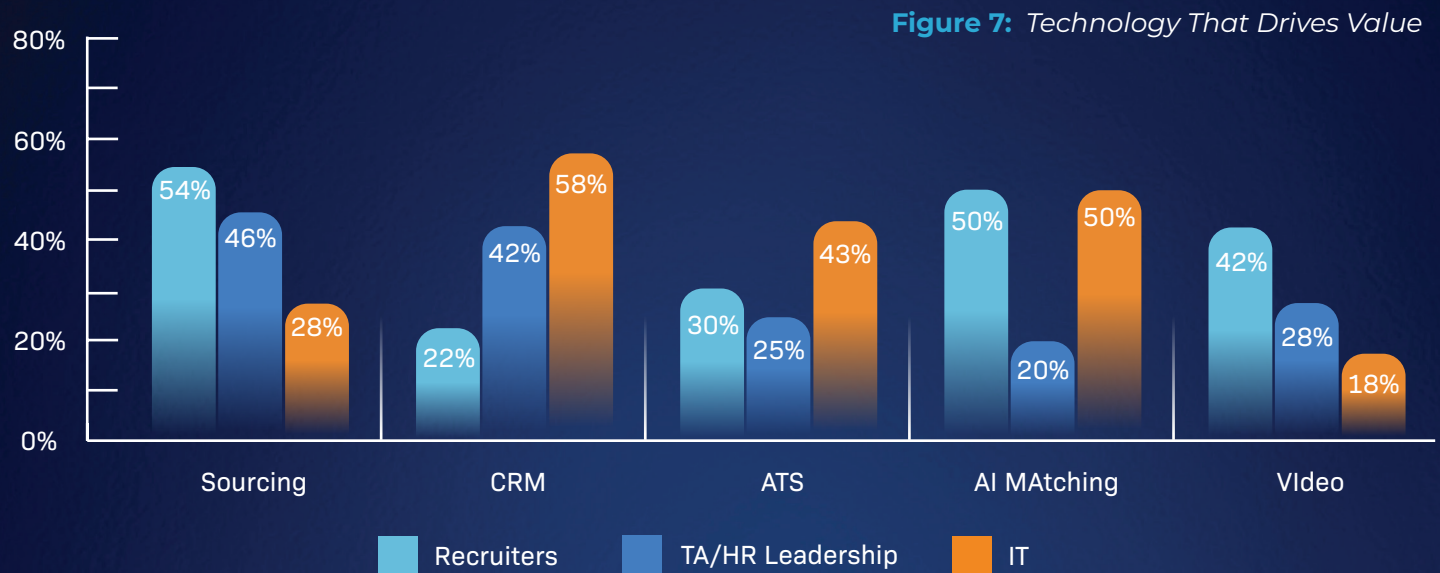


Integrating talent acquisition and HR systems has significant benefits in providing consistent data, enabling a better experience, and eliminating manual processes. Yet, integration has long been a point of frustration for many talent acquisition professionals investing in new technology and recruiters using the technology. Many companies lack dedicated resources and underestimate the needs and expectations of IT to build integrations. Providers downplay the challenges of working with partners and the willingness to work with their competitors. And IT and HRIT are typically preoccupied with other priorities.



## What Technology Drives Value?

The technology that delivers value varies for different stakeholders. For instance, while IT and HR/TA leaders place emphasis on CRM, recruiters encounter difficulties in adopting these systems and instead recognize sourcing as the primary value driver. For a CRM to achieve broader adoption, it should seamlessly integrate the tools recruiters require to identify and engage with top talent.

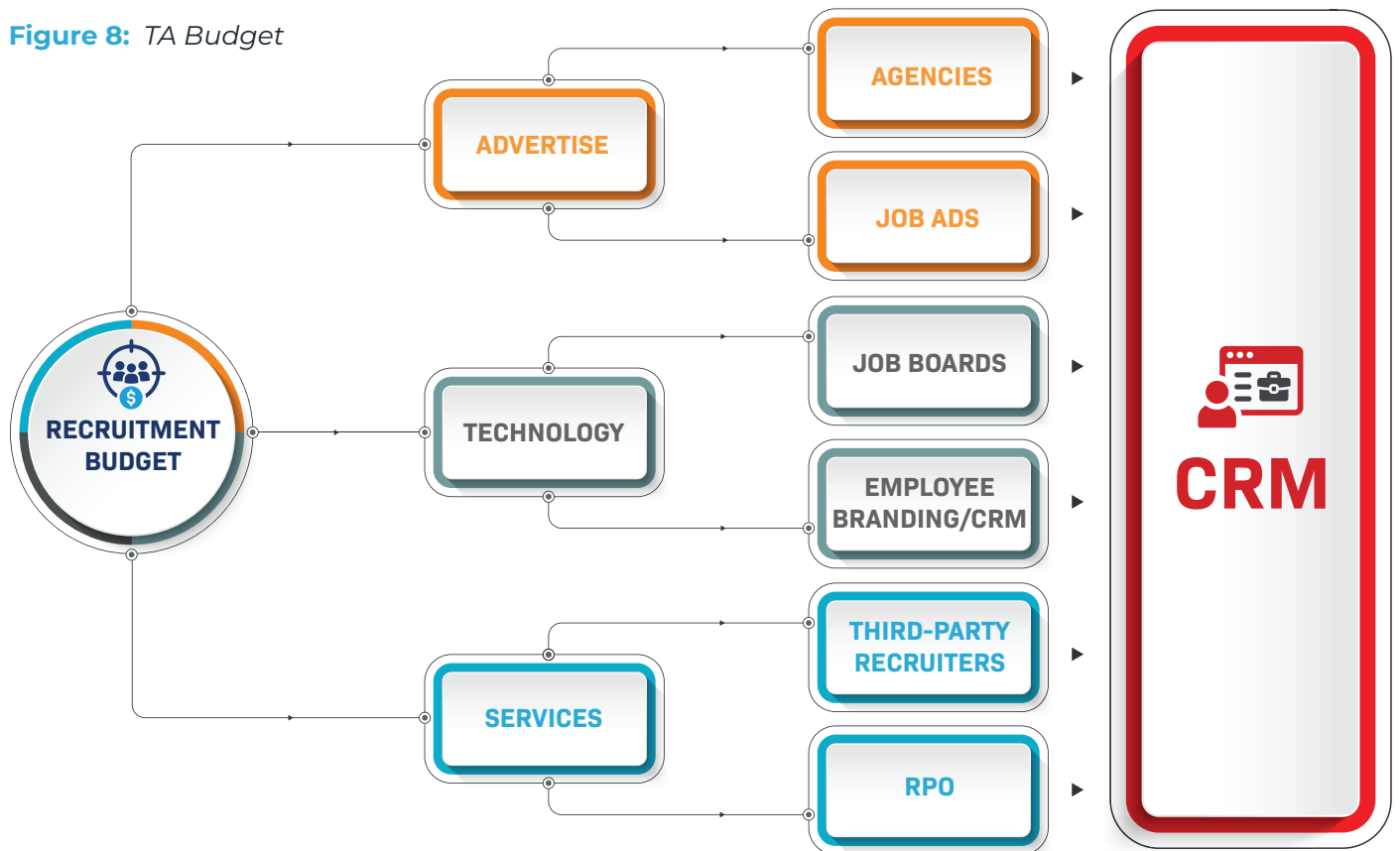


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## An Investment in ROI

When building a business case for a CRM investment, most organizations struggle to gain buy-in and find a budget. According to Aptitude research, companies can spend two to three times what they spend on an ATS on their CRM. The reason is that companies are replacing a combination of services, technology, and agency costs. A CRM eliminates the high costs of agencies and consolidates the experience and data of the attract phase. The result is a more consistent experience and conversion of candidates throughout the process.



**Figure 8: TA Budget**


According to Aptitude Research, only one in two companies measure the ROI of their CRM. When measuring ROI, companies should consider the following:

- 
**Measure ROI early:** Companies should work with providers to set expectations for how ROI can be measured and what goals they have for this technology. By clearly identifying the benefits and costs, companies are more likely to see a quicker return on their investment.
- 
**ROI includes both short-term and long-term benefits:** Companies can see an immediate increase in the volume of applicants or the conversion of leads to applicants while the candidate experience and quality of applicants may take longer to achieve. Clearly defining both short-term and long-term goals will help in building the business case.
- 
**Include Risk Analysis:** Companies should consider the risk of not having a CRM when calculating the ROI.

The ROI analysis looks at the financial value of an investment in a CRM as well. The ROI is calculated simply as the Net Benefit compared to the Total Cost of the project. For most organizations that make this investment, they are consolidating spend on multiple tools, technologies, and services into one single platform.

## BENEFITS

Overall, CRM improves the health and efficiency of a talent acquisition function. It enables recruiters to be more prepared and data-driven in their approach to finding and attracting talent. Benefits fall under three categories: efficiency (time to fill/conversion rates), effectiveness (quality of hire/quality of applicant/overall decision making), and experience (candidate, hiring manager, and recruiter experience).

## COSTS

Companies must outline the estimated costs required to implement the new solution, including solution provider costs, (products, licensing, services, internal costs (implementation labor, management, support, etc.), and other external fees.

## RISK ANALYSIS

Without an integrated CRM, organizations have several options available for attracting talent. Some of these alternatives include the use of disparate tools, stand-alone CRM, advertising agencies, or no solution. These options present several risks to the success of talent acquisition and should be considered as companies calculate their ROI.

### Risk Analysis Considerations:



#### Personnel:

How do we make sure that we have the resources needed to run this project?



#### Performance and Scalability:

How do we make sure that the solution performs as expected?



#### Security:

How do we make sure the candidate data we collect is secure?



#### Candidate Experience:

How do we make sure this solution can improve the candidate experience?



#### Integration:

How do we make sure we integrate with the right systems? How seamless is this integration?



#### Quality of Hire:

How do we measure if this solution helps us compete for talent and attract the best fit?



#### Technology:

How do we make sure employees adopt this new system? What if we run into bugs when implementing?



#### Conversion Rates:

How do we track conversion rates consistently throughout the process?

## Adopting a Recruiter CRM

The adoption of a Recruiter CRM with advanced sourcing and analytics capabilities is a strategic imperative driven by its transformative impact on the recruitment landscape. This adoption is facilitated through a phased approach that may include:

- ✔ **Comprehensive Training Programs and Community Networking:** Implementing thorough training sessions to ensure recruiters are well-versed in the functionalities of the CRM, enabling them to harness its full potential for sourcing and analytics.
- ✔ **Pilot Programs:** Initiating pilot programs with a select group of recruiters allows for hands-on experience and feedback. This iterative approach ensures a smoother transition and addresses any initial concerns.
- ✔ **Clear Communication of Benefits:** Articulating the tangible benefits of the CRM, such as time savings, improved candidate targeting, and data-driven decision-making, establishes a compelling case for adoption among recruiters and stakeholders.
- ✔ **Integration with Existing Workflows:** Seamlessly integrating the CRM into existing recruitment workflows minimizes disruption. Ensuring compatibility with current processes encourages adoption by making it a natural extension of familiar routines.
- ✔ **Performance Recognition:** Recognizing and highlighting success stories where the CRM contributed to successful hires or optimized recruitment processes reinforces its value. Celebrating early wins fosters positive perceptions and encourages broader adoption.
- ✔ **Continuous Support and Feedback Loops:** Establishing a robust support system and feedback loops ensures ongoing user assistance and allows for refinements based on user experiences. This iterative approach promotes sustained adoption and continuous improvement.

By combining these strategies, organizations can pave the way for the successful adoption of a RCRM with sourcing and analytics, empowering their talent acquisition teams with advanced tools for a more strategic and efficient recruitment process.

## Measuring Success Moving Forward

Companies considering a more effective option for their CRM will need to measure success differently. Below are some metrics that will help companies ensure that they are getting a return on their investment.

- 
- ▶ **Candidate Engagement Metrics:** Track the level of engagement with candidates, including the frequency and duration of interactions. This can include email opens, click-through rates, and responses to outreach.
  - ▶ **Pipeline Conversion Rates:** Measure the conversion rates at different stages of the candidate pipeline. Assess how many potential candidates move through each stage and eventually convert to applicants or hires.
  - ▶ **Time-to-Fill:** Monitor the time it takes to fill open positions from the initial identification of a candidate to the final hiring decision. A well-implemented CRM can streamline processes, reducing time-to-fill.
  - ▶ **Quality of Hire:** Evaluate the performance and fit of candidates hired through the CRM. Assess metrics such as onboarding success, job performance, and retention rates to determine the quality of hires.
  - ▶ **Source Effectiveness:** Analyze the effectiveness of different candidate sources. Identify which channels, platforms, or strategies yield the highest-quality candidates and contribute to successful hires.
  - ▶ **Communication Effectiveness:** Assess the effectiveness of communication strategies within the CRM, including response rates to outreach, open rates for communication, and candidate engagement through various communication channels.
  - ▶ **Candidate Satisfaction:** Gather feedback from candidates about their experience with the hiring process. Positive candidate experiences can enhance employer brand and contribute to a talent pool willing to consider future opportunities.

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- ▶ **Diversity Metrics:** Monitor diversity and inclusion metrics within the candidate pipeline. Assess whether the CRM contributes to a diverse pool of candidates and supports diversity hiring goals.
  - ▶ **Talent Pool Growth:** Measure the growth of the organization's talent pool over time. A successful CRM should contribute to the expansion of a qualified and engaged talent community.
  - ▶ **User Adoption and Usage:** Track the adoption and usage rates of the CRM among recruiting and HR teams. High user adoption is crucial for the effective utilization of the CRM solution.
  - ▶ **Referral Program Effectiveness:** If applicable, measure the success of referral programs facilitated by the CRM. Assess the quantity and quality of candidates referred by existing employees.
  - ▶ **Recruitment Marketing Metrics:** If the CRM includes recruitment marketing features, track metrics related to the performance of marketing campaigns, such as click-through rates, conversion rates, and reach.
  - ▶ **Cost Per Hire:** Evaluate the overall cost associated with hiring, including recruitment marketing expenses, technology costs, and time spent by recruiters. A CRM should contribute to cost-effectiveness in the hiring process.
  - ▶ **Sourcing Channel Effectiveness:** Evaluate the performance of different sourcing channels and methods. Identify which channels yield the most promising candidates and contribute to successful placements.

# THE SELECTION PROCESS: EVALUATING, IMPLEMENTING, AND ADOPTING



With many providers entering this market, determining the right partner is challenging. Companies must look at the company, culture, product, and key differentiators. But they must also look at their level of maturity and unique requirements.

Below are internal questions, external evaluations, implementation questions, and change management suggestions to consider when evaluating providers:

## INTERNAL QUESTIONS

Does your company have a lack of visibility into recruiting technology ROI?

Does your company have enough candidates for high-volume positions?

Does your company have trouble reaching target audiences?

Is your company using multiple, disparate solutions for recruitment marketing and sourcing?

What resources do you need and what is available?

What is your process for evaluating business cases?

Who will be the change champion for the project?

## EXTERNAL QUESTIONS

### Company Background Evaluation Questions

What is the heritage of this provider? Is the heritage in talent acquisition or another industry?

What is the company culture and leadership style of this provider?

What is the average size of this provider's customer?

What industries does this provider serve?

## Product Background Evaluation Questions

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What products does this provider offer (including products outside of talent acquisition)?

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How many major or minor releases are scheduled each year?

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What percentage of the employees at this provider are focused on product development?

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What is the development technology?

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Does this provider offer an open API?

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How many languages are supported?

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Does this provider integrate with an existing tech stack?

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How long does implementation take?

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What services are available, and what do these services cost (training, implementation, customer support)?

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Does this provider offer a dedicated customer support representative?

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How many customers are currently live on this product?

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Does this provider comply with DOE, federal, state, and local regulations?

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Does this provider have the ability to restrict data access by role, IP, or report?

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Is this provider SOC 2 Type II Certified?

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What is the product roadmap for the next quarter? Year?

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Is the provider leveraging AI, and if so, in what ways?

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## Implementation Questions

Most companies are not prepared for implementation – regardless of how many times they may have purchased a solution. Implementation can require additional resources, time, and money. And, too often, companies do not take the time to understand their own requirements before implementing a system.

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What resources do we have internally to support implementation?

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What is the timeframe for implementation?

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Do we need an outside consultant for implementation?

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What extra costs can we expect?

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## Change Management

Change management is an important step to ensure adoption, but it is often ignored. Companies tend to focus their resources on fast implementation and overlook long-term strategies for success. Change management can be challenging for various reasons, including negative experiences with prior implementations, fear of new technology, and resistance from employees. Companies must be open to feedback and address any concerns with the change, even when the idea of new technology is very promising. When organizations are willing to invest the right amount of time and resources into managing change, they improve adoption and reap the benefits of technology much more quickly.

### Companies should consider the following to support change management initiatives:

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Who will be the change champion, and does that individual reside in talent acquisition?

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What communication strategy will we use to engage with key stakeholders and employees?

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What are the common change management mistakes we have encountered in the past?

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What metrics should we evaluate to ensure adoption?

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How often will we evaluate our change management strategy?

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## CONCLUSION

The dynamic landscape of the job market demands a sophisticated and streamlined approach to identifying, engaging, and nurturing potential candidates, and CRM platforms designed specifically for recruiters provide the necessary tools to achieve this. By leveraging advanced technology, data analytics, and automation, these solutions empower recruiters to build and maintain meaningful relationships with candidates throughout their entire journey. As the demand for top-tier talent continues to intensify, embracing CRM solutions for recruiting not only enhances efficiency but also ensures that organizations stay competitive in attracting and retaining the best candidates. The future of CRM in the realm of recruitment lies in its ability to revolutionize the hiring process, fostering a strategic and personalized approach that aligns seamlessly with the evolving needs of both recruiters and candidates alike.

## ABOUT US

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Aptitude Research is a leading human capital management (HCM) research and advisory firm. Our in-depth research and vendor assessments help HR leaders develop a deep understanding of the HCM technology landscape, including talent acquisition and engagement, to ultimately make better purchase decisions.

Our proprietary research delivers a comprehensive look at talent acquisition trends and technology. This knowledge, combined with our consulting and advisory services, enables companies to save time, money and improve the recruiting, hiring and workforce management experience.

Founded by leading analyst Madeline Laurano and based in the Boston area, Aptitude Research provides a wealth of HCM expertise to companies, vendors and investors. View our recent and upcoming research at [www.AptitudeResearch.com](http://www.AptitudeResearch.com) or connect with us on [Twitter](#) or [LinkedIn](#).



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