

# The Buyer's Checklist to Talent Acquisition Platforms

A quick guide for browsing and comparing talent tools such as CRMs, talent marketing, and talent operating systems.

The talent acquisition technology space is crowded. Every year, new features, new capabilities, and new trends emerge on the market, and keeping track of all of them is impossible even for the most experienced buyers. This checklist is designed to help you quickly shortlist talent technology providers based on your needs, and identify the questions that will require the most attention from your buying team during the RFP process.

## Core Capabilities

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The first step of your search will start with defining the core capabilities that any modern talent team needs to be able to compete for great candidates. These are functionalities that your competitors are most likely already using, and that most talent platforms offer. If a vendor is missing some of these core capabilities, they should probably not be on your list.

### Talent CRM

- ☐ Sourcing candidates (across sources, web pages, etc)
- ☐ Boolean search, advanced filters
- ☐ Confidential profile capabilities (e.g. Executive search)
- ☐ Pipelining, tracking candidates through stages
- ☐ Talent pooling, grouping candidates by role or other custom pools
- ☐ Custom tags

### Talent Data Platform

- ☐ Identification and matching of candidate profiles across all connected talent tools
- ☐ Data cleansing, standardization, deduplication and enrichment, to enable high quality systematic analysis
- ☐ Single source of truth for candidate, recruiter, job, company, and market data
- ☐ Advanced analysis of data to produce predictive insights such as candidate recommendation, suggested workflows, predictive workforce planning, personalized candidate journeys, or optimized resource allocation

### Integrations into the talent tool stack

- ☐ Integrations offered (ATS, HCM, Careers Site, email clients, etc)
- ☐ Quality of integration: Real-time vs periodic imports, direction of information flow (one direction only or bi-directional), fields imported, etc



## Talent Marketing

### Career site functionalities

- ☐ Job search
- ☐ Languages and regions
- ☐ Job suggestions and content based on browsing history and application history
- ☐ Custom landing pages functionalities (no code needed)
- ☐ WCAG 2.1 AA accessibility standards
- ☐ SEO functionalities

### Events

- ☐ Team collaboration and task management functionalities
- ☐ Online and offline event signup, desktop and mobile
- ☐ Custom registration page content and set up (no code needed)
- ☐ Virtual event functionalities (digital event registrations, on-demand event recording pages)

### Conversion

- ☐ Optimized forms (multiple question types, optimized for completion)
- ☐ Pop-ups, reminder emails and other page abandonment technology

### Email campaigns

- ☐ Out-of-the-box recruiting templates
- ☐ Custom email building capabilities

## Reporting on candidates and recruiting activities

- ☐ Candidate segmentation and custom analysis
- ☐ Candidate source and attribution analytics
- ☐ Pipeline coverage and forecasts
- ☐ Candidate engagement, touchpoints and conversion
- ☐ Page visits, conversion, sources of traffic
- ☐ Costs and candidate source effectiveness



## Enhancements

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These are the special features that make some solutions stand out, and make the core capabilities much more impactful. Ask in-depth questions about each functionality: why is it valuable for the business, and for the recruiting team? What do the outputs look like? Does it require a specific technical setup, or a certain level of data quality before it's really useful to the recruiters?

### Productivity and speed

- ☐ Browser extension for sourcing
- ☐ Bulk actions, such as bulk imports of candidate or job records, bulk assigning candidates to a workflow or a pool, etc.
- ☐ Custom fields and global tags
- ☐ Custom automated workflows: programmable actions that can be built by recruiters based on candidate attributes and updates, automating candidate progression, data cleanliness, email outreach campaigns...
- ☐ Triggered workflows: actions triggered automatically by user behavior, candidate behavior, or an interval of time.

### Data quality and accessibility

- ☐ Ability to perform search in unstructured data (attachments, CVs, etc)
- ☐ Data enrichment based on publicly available sources, such as social media profiles (Number of sources? Frequency of updates?)
- ☐ Record deduplication before and after adding candidates

### Decision assistance

- ☐ A/B testing functionalities
- ☐ AI-suggested next steps in workflows
- ☐ Candidate scoring and candidate suggestions

- ☐ **Mobile enablement across all functionalities**



## Technical Reliability

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Many talent acquisition platforms offer exciting functionalities, but cannot deliver on them because the technical infrastructure supporting them is slow, outdated, or not able to handle the volume, security or compliance requirements of the business. If the solution is not up to certain technical standards, both your recruiter and your candidate experience can be hugely limited, which would severely impact adoption internally, and affect the results of the recruiting team.

### Security and confidentiality

- ☐ Compliance-specific features to assist with data privacy laws such as GDPR or CCPA
- ☐ Permissions levels for different use cases

### Industry security compliance

- ☐ ISO 27001
- ☐ SOC 2 Attestation

### Global data protection compliance

- ☐ EU:US Privacy Shield Certification

### International data compliance

#### *Russia*

- ☐ Ability to recruit Russians citizens, and/or to operate on Russia territory, with localized data processing capabilities, including access, storage, handling, enrichment and maintenance.

#### *China*

- ☐ Ability to hire Chinese citizens. This can be achieved by maintaining a regularly updated copy of all candidate data related to Chinese citizens in a data center within Chinese jurisdiction.

#### *EEO/OFCCP*

- ☐ For audit purposes, ability to store logs of applicant searches, or candidate searches if searches are used to convert candidates into applicants
- ☐ Ability to capture candidate data on EEO-related information (gender, race, disability, etc) in a compliant manner
- ☐ Ability to show or restrict fields of information covered by EEO depending on users' permission access

### Architecture, scalability

- ☐ Overall architecture diagram
- ☐ Response times, load times, SLAs on down time
- ☐ Number of records that the platform has handled to date, overall and concurrently



## Business Outcomes and Support

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Every provider chooses to partner with their customers in a different way, and to support them with their specific strengths. This is not about customer support, which should be considered separately. These business qualifications are more around the nature of the partnership that you can have with your vendor, and the value they can help you create by sharing business insights, best practices, or consulting services for example.

### 360 talent acquisition outcomes services

- ☐ Talent acquisition strategy consulting services provided by a separate research or consulting team
- ☐ Tactical campaign development and design provided by a separate recruitment marketing or employer branding team
- ☐ Anonymized and aggregated industry data and insights generated by provider

### Business predictability

- ☐ Partnerships with reputable providers in the talent ecosystem
- ☐ Visibility and communication levels over product roadmap

### Business impact

- ☐ Customer references, live or in implementation
- ☐ Case studies showing clear business impact

### ☐ Other services



# About Beamery

Beamery's Talent Operating System allows enterprises to attract, engage, and retain top talent, and manage the entire talent journey through one unified platform. Beamery's mission is to help the world's best companies acquire their greatest assets: their people. Founded in 2014, Beamery is trusted by the world's most innovative global organizations to treat their candidates like customers. Beamery has offices in London, Austin, and San Francisco.

For more information, visit the [Beamery website](#), follow [@BeameryHQ](#) on Twitter, or email us at [info@beamery.com](mailto:info@beamery.com).

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