Gem | EBOOK

# The *ultimate buyer's guide* to a recruitment CRM

A complete guide to candidate relationship management and recruitment CRM

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# Introduction

If you're in talent acquisition, you're navigating a rapidly changing landscape—talent shortages, shifting market dynamics, heightened candidate expectations, and intense competition for the same top talent. This chapter dives into these challenges and explores how modern strategies and tools can help your team overcome them to thrive in today's hiring environment.

# Recruitment by the numbers

If you're in talent acquisition (and let's be honest, why else would you be reading this?), any number of circumstances in the industry are making your job more challenging right now—whether it's talent shortages, sharp changes in the hiring market, heightened candidate expectations, or competition from recruiting teams who are eyeing the same talent you are.

At Gem, it's precisely these types of challenges that we're excited to help address:

**67%**

**of recruiters**

say that their job is more difficult today than it was five years ago

**Nearly**

**70%**

**of companies**

claim that "competing for talent across industries" is their top challenge

**Over**

**60%**

**of companies**

say that improving the candidate experience is their top priority

# Recruiters are recognizing they need new approaches to talent acquisition

In response to these challenges, many of them are turning to "candidate relationship management"—a set of strategies based on best practices from sales and marketing—to attract, engage, and nurture relationships with top passive talent even before there's an opening for them. This makes sense, since between 70% and 80% of "recruiting" happens prior to application. The mindset allows teams to be proactive rather than reactive. The upshot? Recruiters have a full, warm pipeline of high-quality talent—not to mention a faster time-to-hire and a lower cost-per-hire—when a role does open. At the same time, the TA technology market has had to become more strategic; and TA teams now have access to solutions that automate those same strategies.

That's where recruitment CRMs come in. If candidate relationship management is the set of strategies to keep living, vital relationships with former, current, and prospective candidates; then recruitment CRMs are the platforms that allow those relationships to develop and thrive. The origin of modern recruiting is where the mindset meets the technology

Remember

## Recruitment CRMs are no longer a luxury for talent acquisition teams

—no matter what size organizations they're recruiting for. In our two-part comprehensive guide, we cover all the bases: what a recruitment CRM is, why you probably need one, how to find the one that's right for your talent acquisition needs, and (in Part 2) best practices for managing candidate relationships once you've got one.

# Here are some reasons your organization might want to consider sourcing, if it isn't already:

In this time-poor industry, recruiters deserve technologies built just for them—ones that will automate or accelerate their daily tasks, serve as a source of truth for candidate data, track every touchpoint they've ever had with talent, offer metrics to help them better understand their outreach and their hiring pipelines, and help them inspire prospective candidates with content that generates excitement about the company

It's clear to us at Gem that business leaders are more and more recognizing the importance of talent acquisition (TA) to their organizations. They're empowering their TA teams to make strategic business decisions and rethinking their technology stacks to drive hiring efficiency and offer better candidate experiences. This empowerment puts TA teams in a tremendous position: to get to choose which recruitment CRM they should use. We're here to take the complexity out of that decision. So regardless of where you are in your CRM journey, we've written this buyer's guide as a choose-your-own-adventure of sorts. Maybe you're in one of these stages, asking these questions:

- **Wait—what's a recruitment CRM... and how is it different from the ATS I'm already using?**
- **I know what a recruitment CRM is; but what are its benefits?**
- **I know what a recruitment CRM is; but how do**
- **I know if my team needs one?**
- **How do I determine what features my org needs in a recruitment CRM?**
- **What are the most essential features of a recruitment CRM?**
- **What steps should I should take to choose my CRM provider?**
- **I've narrowed down my CRM providers; now what questions do I ask in the demos**

Regardless of where you are in your journey, we think you'll find valuable information here to help you make the best investment for your team, your company, and your candidates. Jump in and start at the section that's most relevant to you. And if you have any questions, feel free to reach out to us at gem.com. Answering questions is one of our favorite pastimes.

**25%**

of companies plan to invest more in their CRM capabilities in 2024

**80%**

of recruitment agencies of all sizes have adopted one

**80%**

of SMBs are looking for solutions that will help them improve the candidate experience

**50%**

of SMBs plan on investing in pre-applicant capabilities this year

*Recruiting tech 101*

# What is a recruitment CRM?

This chapter covers the ins and outs of a recruitment CRM. These are often referred to as "pre-applicant platforms." At Gem we think that's a misnomer, since some CRMs manage the entire recruitment process, from the top of the funnel all the way to hire. It might help to compare them to a platform you likely already know: the sales CRM (think HubSpot or Salesforce), which was built to initiate and maintain long-term relationships with prospects with the goal of eventually converting them to customers.

# What does a good talent CRM support?

In the pre-applicant phase, recruitment CRMs help TA teams manage outbound sourcing; build talent pools around criteria such as role and geo; engage those talent pools with targeted nurture campaigns; access analytics to observe how campaigns are doing, identify best outreach practices, and help recruiters manage their performance; and support talent teams in controlling the overall employer brand. However, the work is hardly over at outreach. Here's a shortlist of what the best CRMs support from top to bottom-of-funnel: A centralized, searchable database to manage both active candidates and passive prospects.

- The capability to proactively source talent (integration with LinkedIn, for example)
- Segmentation of talent into networks / communities so you can tailor content to profile type
- Automated email capabilities to nurture talent pools, allowing for both personalization and outreach at scale
- Interview scheduling
- Integration with careers pages and events platforms for auto-capture of new prospect data
- Comprehensive reports, dashboards, and analytics that track outreach success, recruiter performance, and hiring funnel passthrough rates
- Background checks and pre-employment screening
- Collaboration features for better communication between recruiters and hiring managers, and so leadership can participate in prospect outreach through aliases or send-on-behalf-of (SOBO)
- Digital offer letters
- Job and offer approvals

# Wait—so how is a talent CRM different from my Applicant Tracking System (ATS)?

Good question. There's enough overlap between the best CRMs and the ATS that it's worth asking. A refrain we often hear at Gem is: "But I already have an ATS; why do I need a CRM?" It doesn't help that many ATS vendors claim their solutions already have CRM functionality—though they typically don't.

Rather than thinking of the CRM as supporting top-of-funnel workflows and the ATS as supporting bottom-of-funnel workflows, it's better to distinguish them in terms of whose data they hold and what kind of recruiting mentalities they support. Applicant tracking systems are for applicants: active talent that's taken the decisive step of formally signalling they want to work for you. They serve as central hubs for organizing job postings, processing resumes, scheduling interviews, tracking applicants as they move through process, and managing onboarding once they're hired. They're terrific solutions for organizations that post jobs and receive high volumes of resumes. In short, the ATS is built around job vacancies and supports reactive hiring. But until talent applies, there's no place for them in an ATS. If you're sourcing passive talent and you only have an ATS, you have nowhere to store that prospect data.

**Remember**

**The ATS is built around job vacancies and supports reactive hiring.**

But until talent applies, there's no place for them in an ATS. If you're sourcing passive talent and you only have an ATS, you have nowhere to store that prospect data.

CRMs, on the other hand, support proactive hiring. They're the ecosystem and source of truth not just for applicants, but also for prospective candidates: former silver medalists, talent you've met at professional events and who you think would be a good fit for your company, referrals from current employees, folks you've come across on LinkedIn that you'd like to nurture relationships with for the next time that role opens. In other words, if your hiring model is still the old-school "post-and-pray" model, your ATS alone should suffice—you're just likely to run into trouble when you've got an opening that has to be immediately filled, and you have no talent pipeline to draw from. But if you're building a modern recruiting machine—in which sourcers seek out top talent, build talent pools, nurture those prospects, and enhance the end-to-end candidate experience—then a CRM is a crucial add to your recruiting tech stack.

Classic ATS solutions quickly reach their limits on a number of fronts. They keep you dependent on data that candidates input themselves, rather than on information you discover about them. They don't allow visibility into whether prospective candidates are active or engaged, since they force you to gauge interest through formal interaction. They don't let you track respondents or attendees to events so you can nurture those relationships over time. And if you have evergreen or hard-to-fill roles—like engineering or leadership—for which you're not exactly seeing a deluge of applications, your ATS isn't going to help you there, either. You need a solution that will set the recruiting team up for proactive outreach, so they can build a pipeline of passive, vetted talent.

Don't get us wrong, we love Applicant Tracking Systems—we integrate with them! But they aren't a substitute for a good recruitment CRM. A CRM facilitates the entire recruitment process from the very top of the funnel while enhancing the candidate experience through relationship-building and personalization. It does so with infinitely greater efficiency than if you were trying to manage those relationships manually. And it gives you data about your processes so that recruiters, hiring managers, and talent ops can make better decisions, and sourcers and recruiters can dedicate more time to the tasks that matter most: establishing and maintaining relationships with passive talent, so they can fill those requisitions. Here's why that's worth doing:

**Remember**

## Talent CRMs support proactive hiring

seeking out and nurturing relationships with passive talent, rather than limiting your pool to active applicants.

# Why sourcing passive talent makes sense

**33%+**

of TA professionals reported a decrease in applicant quality across the board last year (2019).

**42%**

of resumes received are from candidates who don't meet the role's requirements.

**70%**

of the global workforce are passive candidates. When you post a job, you're only tapping into 30% of the workforce.

**86%**

of the most qualified candidates for your open roles are already employed and not actively seeking a new job.

**50%+**

of talent who took a new job in 2019 weren't searching for one: somebody reached out and found them.

**90%**

of global professionals are open to new opportunities, even if they aren't actively looking for work.

# What are the *benefits* of a recruitment CRM?

Recruitment CRMs empower talent acquisition teams to overcome inefficiencies, unlock insights, and optimize every step of the hiring process. This chapter explores how CRMs drive measurable gains, from boosting recruiter productivity to identifying best practices and addressing bottlenecks in the hiring funnel.

# Here's some of what Gem's customers report:

As we discussed above, sourcing requires recruiters and hiring managers to spend more time than they might otherwise outlining their ideal candidate. As they do so, they develop a better understanding of the role and what "success" looks like in it… and the more conversations they have with top passive talent in the industry, the more refined their visions and searches become. This alone leads to an increase in quality of hire. But there's more.

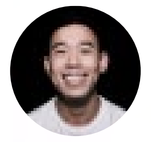
Of course, the data below isn't to suggest that active talent is necessarily lower-quality talent. Job postings can absolutely bring in resumes from terrific applicants. The difference lies in the amount of sifting you'll have to do to find that proverbial needle in the haystack, that four-leaf clover in the field... or whatever your metaphor of choice is. Application-inspection can be well worth the time and energy it takes... and there are certain things that hold, generally speaking, about "active versus passive talent." Both things can be true at the same time. That said, here are some things to consider when it comes to sourcing and quality of hire:

BENEFIT 1

# See measurable gains in sourcer and recruiter productivity

Depending on whom you ask, recruiters are spending somewhere between 8 and 14 hours a week on manual tasks. That's between 1 and 2 workdays' worth of wasted time per week. A recruitment CRM automates many of those manual tasks without the byproduct of human error: recording recruiters' activities as they perform them, logging inbound and outbound communications, even automatically capturing prospective candidate data from LinkedIn. With those inefficiencies eliminated, recruiters have more hours in the week for tasks—such as strengthening candidate relationships or taking on strategic advisor roles—that actually boost profitability. And unlike spreadsheets, a talent CRM is a scalable solution.

"By automating painful manual processes, Gem has boosted our team's productivity by 12×. We're sourcing faster and more efficiently than we ever thought possible. Our team can now focus on what's most important—providing stellar candidate experiences."



**Chinsin Sim**
Senior Technical Recruiter

Robinhood

BENEFIT 2

# Identify and replicate best practices of your top performers

Thanks to their analytics capacities, recruitment CRMs illuminate all aspects of your hiring process—including what's happening at the top of the funnel. Sourcers and recruiters get the insights they need to understand their activity and become better, faster. Is one recruiter's outreach converting candidates at higher rates than others? Dig into that person's messaging to share tips with the rest of the team. Is one recruiter's phone screen-to-onsite ratio particularly good? Dig in and find out how they're conducting those conversations. Ultimately you won't have an "A team" and a "B team": all of talent acquisition will be A-team players, having learned and evolved from each others' best practices.

> "I can find a recruiter in Gem, and I can see what they're sending out and seeing a high success rate with. The team has grown; it's no longer a few of us sitting next to each other asking, 'How are your reachouts doing; what are you sending out?' I can jump in and get that information myself. Which reachouts are seeing the highest reply rates? What about those are unique? Is it the length; the style; the headline? We literally get to learn from each other through data, and leverage that learning to craft better outreach emails."

**Joe Gillespie**
Head of Tech Recruiting

Robinhood

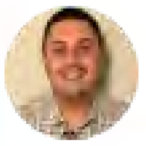
BENEFIT 3

# Identify and correct for the bottlenecks in your hiring process

A talent CRM can tell you at what stages of the hiring cycle you're losing talent, where in the funnel candidates are stuck in a holding pattern, and what hiring managers' behavior is, so you can strategically reposition recruiters and candidates, fix leaky funnels, and make data-backed decisions to keep candidates moving smoothly through process. Gem's CRM analytics allow you to view your full funnel—from initial outreach to hire—so you can answer questions like

- How many offers accepted did Recruiter X get in Q4?
- What have our passthrough rates from phone screen to onsite for Software Engineers in the Austin office been since January?
- How many candidates in the Sales department have offers extended that haven't been accepted yet?
- How many candidates will we need at each stage of the funnel in order to hire 7 Product Managers, based on historic conversion rates?

> "I don't want to put 30 candidates in the pipeline for one role and only two in another; because when we close someone [in the pipeline of 30] we've got 29 candidates that are sold on that particular role, and now we have to try to sell them a different one. With Gem, I can look at the balance of pipelines every week, and be cognizant of the candidates who are role-agnostic so I can educate them on other roles with pipelines that aren't as full."



**Mike Moriarty**
Director of all Technical Sourcing

Dropbox

BENEFIT 4

# Substantially improve your candidate experience

Because they track communication history, recruitment CRMs allow team members to see which colleagues have reached out to which prospects—which means sourcers are never sending multiple touches or stepping on each other's toes. (Messages from multiple recruiters from the same company tops the list of talent grievances, by the way.) You'll also eliminate recruiter "ghosting," so candidates will never feel in the dark about where they are in the hiring process. Talent will feel valued, respected, and more confident in their decision to enter process with you. A CRM also eliminates some of the irritating steps candidates have to take—streamlining the application process or eliminating onboarding paperwork, for example. From the candidate perspective, a CRM allows your team and process to feel like a well-oiled machine.

**Average job application completion rates a based on the length of time it takes to complete an application (in minutes).**

**56%**

of candidates said they would consider working for that company in the future

**23%**

said they would be more likely to buy that company's products and services

**37%**

said they would actively tell others to seek employment in that company

BENEFIT 5

# Substantially improve internal communication and collaboration

One of the biggest communication barriers in an organization's hiring process is the one that exists between recruiters and hiring managers. A good talent CRM offers features for seamless collaboration between these parties, so they can calibrate and align on candidate qualifications and success metrics. Gem's CRM also allows both hiring managers and leadership to collaborate on, and participate in, prospect outreach through aliases or send-on-behalf-of (SOBO).

"The most exciting thing about Gem to me is the night and day change in my Hiring Managers' activity. It has become so easy for them to send customized messages and sequences, and I've never before seen such a willingness to be strategic partners alongside our recruiters."

**Thomas Carriero**
Chief Product Development Officer

twilio segment

BENEFIT 6

# Upgrade your talent brand

Why is employer brand so important? Because 84% of talent would consider leaving their current roles if they were offered a job with a company that had an excellent reputation. These days, candidates have fast access to social networks, Glassdoor reviews, and the power to "screen" you right back; organizations and TA teams have to meet sophistication with sophistication. Because they improve the candidate experience, CRMs necessarily improve your talent brand. And the stronger your brand is, the more likely you are to make those game-changing hires. After all, you'll be top-of-mind with top talent who will recognize your company's name when they see it in their inbox.

> "Gem allows us to be consistent in our messaging. We change up the language, of course; but we have a consistent voice now. So now we're not just building a recruiting pipeline; we're also building a brand. It's pushed me to do things like reach out to our marketing team to get access to our Instagram feed, because we're linking to it in our outreach—which means we need new and relevant recruiting content to be posted more frequently. Prospects are clicking; we have to give them what we promise. So our brand feels alive—which means we're getting amazing inbound applicants, too. It's a virtuous circle."
>
> **Shannon Zwicker**
> Manager of Recruiting Operations
> Cockroach Labs

BENEFIT 7

# Decrease time to hire and cost per hire

Because a CRM is a database not just of applicants, but of all prospective candidates, you've got an entire network of talent at your fingertips for future open roles.

In fact, recruitment CRMs have been cited as the top source for (re)discovery of quality candidates—better than social media and referrals. Use the search feature to find former silver medalists, past applicants, or top talent you've been nurturing, and easily pull up their history with your company and your recruiting org so you can re-engage. It's often the talent you've previously interacted with that will fill those open roles sooner than later.

"With Gem, we made our first hire within two months of signing the contract—and it was around 40% faster than the rest of our hires."

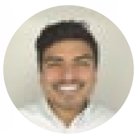
**Shannon Zwicker**
Manager of Recruiting Operations
Cockroach Labs

BENEFIT 8

# Diversify your talent pool

Because talent CRMs allow you to segment candidates, they give you a bird's-eye view of what your talent pipelines look like and what demographics you might be inadvertently overlooking. Diversity is increasingly a priority for companies; but most recruiting teams don't have great insight into their diversity metrics. With Gem, sourcers can report prospect and candidate gender (male/female/non-binary/unknown) by individual or in aggregate, so hiring managers can determine if there's bias in the sourcing process—whether by role or recruiter. We also offer custom fields for tracking other underrepresented groups. Sourcers and hiring managers can track any of these fields—from response rates to initial outreach all the way through the interview—so TA teams understand how their diversity initiatives are performing.

> "Let's say I have a recruiter who is working with four different hiring managers. I'll go into Gem and filter the interview stages by gender. And from there I can see, based on passthrough rates, which hiring managers need help balancing the gender equity on their respective teams. By analyzing the passthrough rates of female candidates across different hiring managers, we can address areas of opportunity when it comes to hiring strong talent that truly represents the diverse market. And if I see a team that's significantly moving the needle on diversity, I dig into what they're doing to see if there's something that can be scaled to the rest of the company. I'm constantly using Gem to look for practices we can magnify and launch as best practices across the org."



**Joel Torres**
Lead Talent Sourcer

twilio

# A *step-by-step guide* to choosing your recruiting CRM

A recent Gem survey revealed that more than half (54%) of CRM implementations are failures—which suggests that they're only valuable if you choose the right one. The best recruitment CRMs are built specifically to suit the workflows of recruiters. You'll need to review your talent team's processes, clarify your business requirements, map your feature priorities, and know what to pay attention to in product demos. We'll take you through those steps in this chapter.

# How do you know you need a talent CRM?

First things first: There's no sense investing in a CRM if you don't (yet) need one. There are many signals that an organization might be ready for one. Here are a few of them:

- There is more than one recruiter in your organization
- You're regularly searching for hard-to-fill roles (engineering, leadership, diversity hires, etc.)
- You're actively sourcing passive talent to supplement your applicant pool
- You're currently using spreadsheets, post-it notes, and other paper-based solutions to manage candidates and candidate relationships
- You have a large database of applicants or resumes that you can't tap into through search or segment into pools for nurture campaigns
- You're wasting precious hours on process and administrative work that could be automated (e.g. email follow-ups or recorded touchpoints)
- You need prospect data to be captured and stored securely
- You have compliance requirements (e.g. EEOC or GDPR)
- Your current CRM's functionality isn't supporting your processes (e.g. reporting isn't comprehensive enough)
- Any time you get a new req, you feel as if you are starting from scratch--without a warmed-up talent pipeline

Once you understand that you need a talent CRM, the next step is to determine the details of what you need.

**Remember**

There are many signals that an organization might be ready for a CRM

STEP 1

# Reviewing your recruitment process

Talent CRMs typically become necessary because business processes demand them. So whether you're working off of spreadsheets and post-it notes right now, or you've got a CRM that doesn't align with your workflow, step one is to uncover why your current system is at odds with your process.

Sit down with your recruiting team/s and document their process. Map out every step. What tools are they currently using to source prospects, find emails, and perform outreach? What's the step-by-step of each workflow, and how often do they perform each of these steps? How do they stay organized? How do they know if another sourcer has already reached out to a prospect? Where are they spending the most time? Where are they doing too much manual work, and possibly costing you productivity? How are they keeping in touch with prospects who aren't ready for change, but want follow-ups in the future? What does the entire candidate journey look like, from first outreach to onsite to offer to accept? How is your team keeping candidates "warm" between steps? What do your sourcers and recruiters say their biggest pain points are in these processes?

Consider your roles and your candidates as well. Are you primarily filling open positions, or are you trying to build a strong pipeline for future openings? Are your prospects active or passive? How do your passive prospects expect to be nurtured? What kind of hiring experience do they all expect to have with your organization?

**Remember**

Step 1 is to uncover why your current system is at odds with your process

STEP 2

# Mapping your priorities /determining your requirements

Now that you have a grasp of your current processes and where they could be better, it's time to establish your requirements and priorities. This exercise will ensure you don't lose sight of what's important as you move into the research and demo phases. It's easy to get distracted by bells-and-whistles and lured in by feature lists; soon enough you've forgotten why you needed a CRM to begin with... or worse, you end up implementing one that's bloated with unnecessary features your team will never use. So: What are the priorities when it comes to recruiting for your company in the next 1–3 years?

Here are some recruiting priorities we often hear, which require different CRM features:

- You need to start actively sourcing talent and building talent pools
- You need to implement diversity hiring initiatives to invigorate your business
- You need comprehensive analytics on your email outreach or your candidate pipeline
- You need to be able to search a candidate database to uncover strong candidates from previous searches
- You need a centralized database that pulls in information from elsewhere—talent events, for example

We're not suggesting these priorities are mutually exclusive; many CRMs offer many of the features needed to support them. But knowing your requirements will help you eliminate certain providers right away. Involve as many "users" as you can in this discussion, from sourcers to full-cycle recruiters to hiring managers to your Head of Talent to your CEO. (Maybe you'll have two conversations—the first with the TA team who'll be using the system; the second with other stakeholders. Those who won't have their hands in the CRM may be more responsive to the bells-and-whistles, whereas recruiters will know exactly what features are necessary.) Getting buy-in from as many people as possible will increase engagement during and after implementation.

**Remember**

Get buy-in from a range of users and stakeholders in these discussions. It increases the likelihood of engagement after implementation.

## STEP 2 CONTINUED

Once you've got your list, it's time to divide it into two buckets: non-negotiables and negotiables. The non-negotiables are the features that, if your recruiting team does not have access to, will prevent them from creating or sustaining the hiring processes they need. The "negotiable" bucket contains the features that would be nice to have, but that you could imagine workarounds for. Think of this second bucket as a wishlist. Maybe they're the features you won't need for another two years, and that a provider might be able to build in the meantime. Maybe they're just the features you're not entirely certain would improve your hiring process. Here's an example of what your lists might look like:

You'll eventually want to share these lists—especially the "must-haves"—with prospective CRM providers so that they can address how they'd meet each of your needs.

| NON-NEGOTIABLES | NEGOTIABLES / "WISH LIST" |
|---|---|
| Integration with our ATS, email provider, events platform, and LinkedIn | Job board integration |
| Analytics (outreach stats, activity views, pipeline analytics) | Mobile functionality |
| Automatic data capture | Career site analytics |
| Email templates and bulk emailing | Landing page templates |
| Mail scheduling and sequencing | Candidate surveys / feedback collection |
| Follow-up reminders | Interview scheduling |
| Search | |

**Remember**

Separating your **negotiables and non-negotiables** keeps you from getting distracted by bell-and-whistle features you'll never use

STEP 3

# Considering your budget

How much you're willing to invest in a CRM will hinge on a number of factors, including how much of a priority hiring is to your organization. CRMs are typically priced per seat, so you should be clear, first of all, about who'll need access to the system. Recruiters? Hiring managers? Executives? Who will need to log in to get high-level views of your pipeline and of recruiter behavior? Who can get printed reports from your sourcers and recruiters without requiring a seat?

When working out your budget, account for the costs of the things you're currently paying for that a talent CRM would allow you to dispense with. This may include job ads, external agencies you're using for recruiting support, or the salaries of your internal TA team, whose productivity might easily double once your CRM is in place. Keep in mind that a talent CRM is likely to reduce your time to hire and cost per hire. And so on.

Putting the cost in the context of your current recruiting spend is a useful exercise—it's much easier to justify when you see reductions in cost and increases in productivity elsewhere. Ultimately, even averting a few bad hires would pay for a talent CRM many times over. (The cost of a single bad hire can be around 30% of that role's yearly salary.)

You'll use this budget to inform your selection process. Just remember that not all CRM providers are up-front about additional costs. When it's time to talk price, you'll also want to ask about:

- implementation or setup fees
- ongoing usage fees
- the cost of additional integrations you may need
- the cost of adding seats

**Remember**

**When working out your CRM budget, remember to** subtract the cost of things you're currently paying for that a talent CRM would allow you to dispense with

STEP 4

# Doing the demo right

As you research vendors, the shortlisting process should be easy if you've identified your requirements and priorities: Any platform that doesn't have a feature you've deemed "essential" can go. If there are a few remaining vendors who can support all your needs, you'll need to evaluate and compare. That's when it's time for demos. As you schedule these, keep in mind who should be present for them. Recruiters should attend so you can get feedback from roles who'll be using the CRM every day. But you might include other roles in your "evaluation committee" as well. You'll want a group that, collectively, has their eyes out for every possible scenario. That's how you'll ultimately get software that's a best-fit.

As your team goes into any demo, remind them to both hold firm to the requirements you've collectively determined and keep an open mind—especially if they haven't used a platform like this before. We are creatures of habit; and it can be difficult to break people away from their established workflows, even when there's an alternative out there that will make their lives easier. Below are some of the high-level things you should be looking out for.

**Remember**

**During the demos, remind your team** to both hold firm to the requirements and keep an open mind

STEP 4 CONTINUED

# Sourcing

In recent years, sourcing has become one of the most important elements of the recruiting process—particularly for leadership positions and hard-to-fill roles. The best candidates for your open positions already have jobs; and you'll want a CRM that helps you source and generate outreach for these passive candidates. Is sourcing candidates directly off of LinkedIn a seamless process? Can you easily get contact information—either through the CRM itself or through an integration with an email finder? Does the CRM offer outreach analytics so you can improve your open rates, click rates, and reply rates? Can it help you see what content performs best?

# Candidate management & engagement

A candidate gets uploaded into your CRM (hopefully automatically)… but what happens next? How easy is it to segment candidates into different pools for campaigns? How effective is the search feature for when you want to invite particular demographics to events? How easy is it to find former runnersup who declined your offer to reach out to again down the road? And so on. We can't stress enough how important nurture is to the candidate process. Will the CRM truly help you build a pipeline of strong relationships, so that you've got people in line when you've got roles to fill?

**Remember**

Broadly speaking, the two biggest things to keep in mind during CRM demos are ease-of-use for your TA team and the larger candidate experience

STEP 4 CONTINUED

# Reporting

If your CRM can't measure what you're doing, you'll never know what's working for your team. That said, you're likely to see some shiny dashboards out there as you demo products—which is why you should always go into a demo knowing which metrics are most important to your recruiting org. There's a lot of data out there, and not all of it will be useful for you. Can your dashboard get you the numbers you need?

# Collaboration

You can't have a successful recruiting and hiring process if your team can't effectively review prospective candidates with hiring managers or see a candidate's history with your company. This kind of communication and cross-team visibility should be effortless. Look for a CRM that connects the right stakeholders with the information they need and provides each user with as much visibility as they need into a candidate's previous engagements with your hiring team.

**Remember**

Regardless of how many people are present for the demo, it'll be worth your while to have an agenda prepared so you can get the most out of your call. Know what needs to be asked, whom the best person is to ask it, and what objections they might need to bring up. You know your workflows and scenarios better than we do; be prepared to ask how each provider would support every possible scenario.

STEP 5

# Making the decision

Be wary of CRM providers who give you a short list of customers you can contact. At Gem, we encourage our prospective customers to reach out via their networks to any of our customers—not just to the first name we give them. Our users stay with us for many reasons; and it's in your best interest (and ours!) to have as many conversations as necessary to make the most informed decision. So no matter the provider you're considering, leverage your network. Find out how other teams' experiences of implementation and training were, what kind of support they've received since, and how powerful and user-friendly the platform has been for them. We particularly recommend getting reviews from businesses of a similar size, with similarly-structured TA teams, and hiring needs (and loads) that look like yours. You know what a song of praise sounds like; you also know what a red flag sounds like… so listen closely.

Hopefully, most of your team has been part of the decision-making process; but once you've signed you'll want to sit down with the TA team and prepare them for the imminent change. Ideally you'll have found a CRM that suits your workflow; but small adjustments are inevitable... and if you made the right choice, those adjustments will only be for the better. How will the CRM impact the way your team sources candidates from now on? How will their relationships to the candidate database change—in terms of navigation, search, nurture, and communication? What can/will campaigns look like now? How will this technology fundamentally change their relationships with talent?

Once your CRM is up and running? Congratulations! Dig in; get to know it; let it become second nature and the most valuable element of your workflow. Because with your newfound speed, efficiency, analytics insights, and reporting capabilities, it will be.

**Remember**

**Look for providers who ask detailed information about your recruiting processes, business requirements, hiring needs, and future goals.** These are signs that the provider is trying to understand how they can best support your hiring org.

# *Questions* to ask prospective CRM providers

Choosing the right recruitment CRM can feel daunting, but asking the right questions ensures you make an informed decision. This chapter outlines the critical considerations for evaluating a CRM—from integrations and analytics to security and support. Armed with these insights, you'll be ready to navigate product demos, compare solutions, and find a platform that not only meets your team's needs today but scales with you in the future.

While a CRM can mean streamlined workflows, analytical insights, faster hires, and improved candidate experiences, it can also become a bottleneck if team members can't get onboard, the workflow is clumsy, the "solution" generates additional manual data entry or busywork, or the CRM simply hasn't been thought of as part of a larger recruitment strategy by its providers. And this will trickle down to talent. Prospects and candidates won't know what recruitment tech you're using, but they will observe how they're being treated. And a negative candidate experience can mean more than losing that candidate. It can mean losing their networks as prospective candidates—as well as prospective customers. That's a big ripple effect. So there are plenty of things you'll want to be clear on before making the commitment. That's why you'll get the most out of your time with a recruitment CRM provider by arriving to the conversation with the right questions. After all, the demo is where you'll be confronted with a well-oiled overview of the CRM with a sales rep who isn't likely to volunteer their solution's shortcomings, and who doesn't know the particulars of your needs.

Of course, you'll have questions specific to your org; but here's our list of questions every TA team should be asking:

QUESTION 1

# Is your CRM built specifically for recruiting?

We're a little biased at Gem, but we think this is the first question you should ask a provider... and for good reason. If a "recruitment CRM" provider doesn't actually have expertise in the recruitment industry, it shouldn't be calling itself that. A lot of talent CRMs brought to market are imitations of sales CRMs and marketing automation platforms—which focus on features like branded emails rather than on maximizing the productivity of recruiting ops or the personal touch that inspires prospect engagement—and serve them up to TA teams as though recruiters' needs are the same as marketers' and sales teams'. But recruiters aren't selling products; they're nurturing and delivering people. They have unique demands, and require unique functionality.

Make sure you ask for case studies and references. These provide "social proof" that recruiting teams with similar use cases to yours have seen success with that provider. Make sure the CRM provider can point to customers of a similar size, with similar workflows and hiring goals.

**Remember**

**Other questions to ask to find out if the CRM is built with recruitment in mind:**

1. How many recruiting teams use your product?
2. How many recruiting agencies use your product?
3. Can you provide customer case studies from recruiting teams?
4. Can you provide references in the recruitment space?

QUESTION 2

# How long does implementation take, and how long to get recruiters up-to-speed?

If your organization is opening a second office next month and needs to hire 900 new employees, a 6-month implementation simply isn't going to cut it. Find out what the provider's average implementation time is. In fact, one of the most valuable decisions you can make before the conversation is what your time frame needs to be: When do you need your CRM to be fully functional and your team to be onboarded and trained by? Does the CRM provider have documented success of implementation with current customers? If the provider promises to have the solution implemented by a certain date, but can't deliver, what happens? Discuss the entire process step-by-step, in detail. You want to know what you'll be in for when it comes to rollout.

**Remember**

## Additional questions to ask CRM providers about onboarding include:

1. What's the extent of your training for current recruiters? What about for new recruiters down the road?
2. How many training sessions does your solution typically require? Does the training take place onsite or online?
3. Do you provide additional training when new features are released?
4. Do you provide online resources for new and current users (e.g. FAQs, tutorials, user manuals, best practices)?

QUESTION 3

# What does customer support look like?

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QUESTION 4

# Do you integrate with my ATS / email / events platform / careers page / Linkedin?

The whole point of a CRM is to gain visibility so you can streamline your hiring processes. But that won't happen if your CRM doesn't talk with your other software solutions. The most efficient CRMs integrate with your applicant tracking system (ATS), so you can access every person who has historically identified in some way with your company, search out those former silver medalists, segment and reconnect with them. They integrate with your email, where so many touchpoints occur—often with many members of your team—before prospects are ready to apply. This way you have the full history of candidate engagement in your CRM, and recruiters don't have to move between platforms for the full narrative.

The most efficient CRMs integrate with your events platform so information can be auto-populated when talent RSVPs or attends your talent talks or your college career fair booth. They integrate with your careers page so when prospective candidates sign up to join your talent community, their information is auto-captured in your CRM. And they streamline workflows by pulling prospect information directly from LinkedIn—the most important networking site for candidates, and where recruiters spend the vast majority of their time. As such, you'll have a seamless ecosystem in which every step of the candidate journey is logged in the CRM. So check in about all of these integrations.

QUESTION 5

# Can I pull reports, and what kinds of analytics will I have access to?

Best-in-class talent teams are tracking numbers and using them to make data-driven decisions. Your CRM should generate custom reports based on this data, so talent ops and hiring managers can get a birds-eye view of the state of hiring and individual recruiters can shift strategies where needed. Here are some of the metrics you should be able to access, download, save, and share:

- **Outreach stats:** Track engagement with open rates, click rates (content stats), and reply rates at the top of the funnel.
- **Activity views:** Where are recruiters spending their time? How many prospects did they upload to the CRM last week? How many messages did they send? How many phone screens did they conduct? Productivity reports help you observe bottlenecks, identify top performers, and replicate and scale their habits.
- **Pipeline analytics:** What do conversion rates look like for each stage of your hiring funnel? Where are candidates getting stuck or dropping out? Passthrough rates for each stage will help you forecast for future hiring, so choose a CRM that can show you these.
- **Filtering:** For all of the above, you should be able to filter by individual recruiter, hiring manager, time period, job, location, gender, and more. (The gender filter is particularly important for teams who are prioritizing diversity hiring initiatives.)
- **Forecasting:** If you need to make 7 hires this month, how many candidates do you need at each stage of the funnel in order to hit that goal? Conversely, how many hires are likely to shake out given the current numbers in your pipeline? A good CRM should give you these numbers so you know how to plan, and where to allocate resources.

**Remember**

**According to LinkedIn, most recruiters and hiring managers are now using data in their talent decisions.** In fact, between 2015 and 2019, the number of recruiters who listed "data analysis" as a skill on their LinkedIn profiles grew by 111%. So if your CRM doesn't give you access to strong analytics reports, you're already behind.

QUESTION 6

# Does your talent CRM have the key features I need?

"Key features" will be determined in part by your organization, your team, and its hiring needs. We walked you through the process of mapping your CRM priorities in the last section; you should bring those into any conversation with a provider. But here are the features you shouldn't do without:

- **Automatic Data Capture.** Whether that means auto-populating CRM fields with LinkedIn data; tracking email sends, opens, and responses; providing email addresses and social links; or syncing touchpoints to the ATS; your CRM should take as much research and data entry off recruiters' hands as possible. Ask what manual activities the CRM relieves you of.
- **Segmentation.** A good recruitment CRM lets you segment prospects and candidates into discrete talent pools (location, role, skills, education level, and other demographics) for outreach and nurture campaigns. After all, an engineer will be interested in different content and events than a VP of sales will be; likewise, college students and veterans require different messaging. With these categories in place, you can send talent pools into different workflows, improving both the personalization and the relevancy of your outreach.
- **Email Templates and Bulk Emailing.** Choose a CRM that allows you to build out messaging with the help of tokens that auto-populate for each person in that particular talent pool when you hit "Send." Otherwise recruiters have to cut-and-paste messages and click a separate "Send" button for every email.
- **Mail Scheduling and Sequencing.** A good CRM should allow recruiters a set-it-and-forget-it mentality: They can build out nurture sequences, schedule the emails to go out one at a time in the coming weeks or months, then move on to their next project.
- **Follow-up Reminders.** If a prospective candidate says they'll be ready to chat in six months, recruiters should be able to set a reminder in the CRM to go off six months from now—or even craft and schedule an email now to go out in six months, while it's top-of-mind.

## QUESTION 6 CONTINUED

- Search. No one wants to grapple with their CRM to unearth a candidate. Your CRM should allow you to search your entire candidate database by attributes such as role, location, education, skills, and more. It should also allow you to conduct Boolean searches (keywords + "AND," "OR," "NOT"), search candidates using multiple criteria, and save your favorite searches so you don't have to recreate them every time a role reopens.
- Notes. A good CRM will log recruiter behavior and interactions with candidates; but you'll want a place for recruiters to leave more detailed notes about those interactions. Why isn't the candidate willing to consider a new role now right now, and when might they be? What reason did the candidate give for dropping out of process after onsite? Why were they rejected for the role? And so on. A complete candidate history means better visibility—and a better candidate experience.
- Customized Workflows. The recruitment life cycle varies across organizations, and you shouldn't have to reinvent your workflow to match your technology. Your CRM provider should be able to reflect the stages in your particular hiring pipeline in your analytics. Make sure you can customize the dashboard to your processes and workflows. Otherwise you'll skip steps and candidates who are in process will go missing.
- Collaboration. You can't have a successful recruiting and hiring process if your team can't effectively review prospective candidates with hiring managers or see a candidate's history with your company. Look for a CRM that connects the right stakeholders with the information they need and allows them to discuss, rate, and otherwise communicate about candidates through the platform. Each user should have as much visibility as they need to effectively perform their role.
- Analytics. We talked about this above, but it's worth reiterating. Your recruiting org has to be data-driven these days if it's going to thrive. Make sure the CRM offers the numbers you need to make better decisions.

QUESTION 7

# What security measures have you taken?

Your records contain a lot of candidate data, and you don't want those databases compromised. Your CRM provider should be SOC 2 Type II compliant, support SSL (https://), use encryption for data transfers and passwords, and set limits on what information can be collected. Remember, your organization's reputation is at stake here.

QUESTION 7

# How often do you release new product features?

At its heart, this question is about innovation. Ultimately, you want to be working with a CRM provider that's investing in consistent improvements to the product; so ask about their product roadmap. Find out how often they build out new functionality or how often they release system updates. If their engineers ever sit in on customer calls to better understand the nature of users' pain points, all the better.

**Additional questions to ask CRM providers about security include:**

1. Will I retain full ownership of my data?
2. Do you have multiple backups of my data? Will I be able to execute my daily activities under all circumstances?
3. Do you have standard processes in place for disaster recovery?
4. Are you GDPR compliant?

QUESTION 9

## Can I see a live demo?

Any CRM provider worth their salt will say yes to this. A demo will help you see whether the reality looks anything like what the provider has promised. It will also get you the answer to one of the most important questions: Is the solution intuitive and easy to use? The best CRM out there is pointless if your team won't adopt it because the interface is complex and the user experience is unpleasant. Every task recruiters have to perform should be accomplished in a matter of clicks.

QUESTION 10

## Are there hidden fees?

Hopefully your CRM provider of choice is up-front with you and their pricing plan is straightforward. But to avoid future headaches, ask about data migration fees, setup fees or implementation charges, support fees, integration partner fees, integration partners' support fees, and taxes. What's the cost of adding new seats? Remember: You want a solution that can scale with your business, and that you can continue to afford as you grow.

# Listen closely to prospective CRM providers

Over the course of conversations with prospective CRM providers, there are other questions you'll be able to answer about provider integrity and care. If they're asking detailed information about your recruiting processes, your hiring needs, and what's caused you to look for a solution, that's a good sign. If they're asking about business requirements, recruiter workflows, and future goals to ascertain how their software can best support your business, that's a good sign. If they're willing to provide multiple demos; if they're transparent about functionality and pricing; if they show how they've demonstrated ROI with their customers; if there's great retention among their employees and leadership team; if they're straightforward about implementation times—these are all good signs.

A good recruitment CRM can turn your recruitment org into a remarkably productive and profitable team. And if you go into your conversations with providers asking these questions, the one you end up choosing will almost certainly be the right choice.

They ask for **details** about your hiring needs, recruiter workflows, business requirements, and goals

They have **strong partnerships**, and/or plans to expand partnerships

There's **great retention** among their own employees and leadership team

They **encourage you** to reach out to anyone in your network who uses them as a reference

# How Gem can *help*

Gem is the AI-powered recruiting platform TA teams love. Use Gem as your all-in-one recruiting platform or enhance your existing ATS with integrated products for CRM, sourcing, scheduling, analytics, career sites, events, and more. Over 1,000 companies – from startups to industry leaders like Airbnb, Wayfair, Cintas, Carmax, Doordash, and Zillow – trust Gem to hire with speed and ease. See why Gem is the industry's most beloved solution, with a 4.8/5 rating on G2.

## *Simplify* your tech stack and cut costs

Consolidate multiple tools into one platform and reduce spend on recruiting technology, job boards, and ads. Customers like Veho and Prestige Care save hundreds of thousands by reducing their reliance on agencies and other sourcing platforms. Our larger enterprise customers like Airbnb and Wayfair use Gem to search for qualified talent in their ATS, accounting for ~50% of their sourced hires.

## Attract, engage, and hire talent *faster*

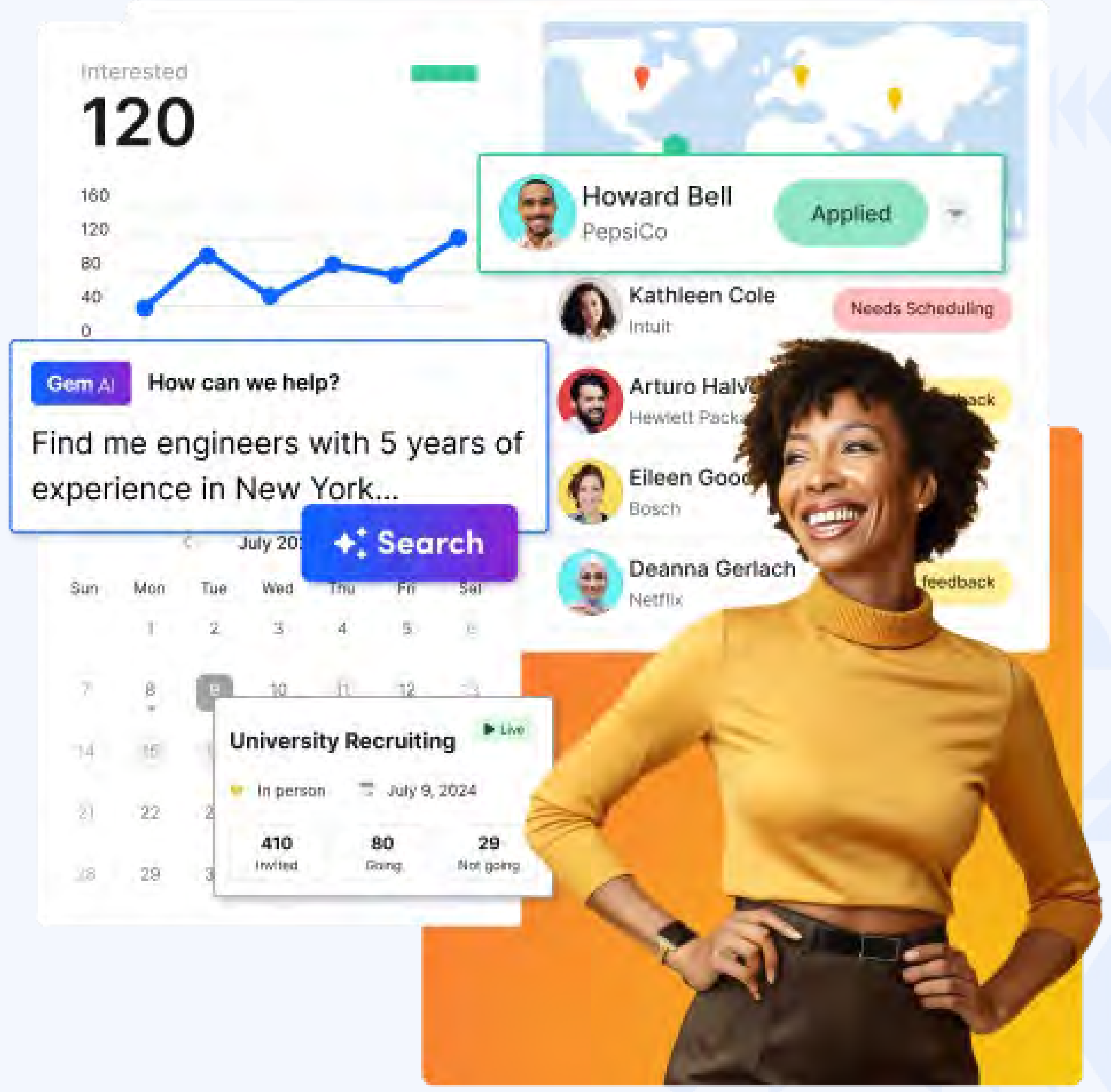
Build high-quality pipelines across all channels through sourcing, nurture, events, career sites, inbound, and more. With Gem, teams can source talent 5x faster with easy, 1-click add and 2x talent pipelines with a stronger employer brand. Our customers like Celestica have used Gem to hire over 700 employees in just 90 days.

## *Maximize* recruiter productivity

Use AI and automation to save time on routine tasks like reviewing applications, scheduling, and managing follow-ups. With Gem, recruiters spend half as much time on routine tasks like reviewing applications, scheduling, and managing follow-ups. Our customers like Procore, Robinhood and Octave have all saved hundreds of hours a month for their recruiters.

## *Unlock* data-driven recruiting

Visualize hello-to-hire analytics to debug your funnel, monitor pipelines, forecast hiring, and demonstrate impact, with data anyone can use. Our deep ATS integrations and no-code analytics interface have allowed teams like Unity pinpoint and address bottlenecks, resulting in a 10-day reduction in time-to-fill.



# Thank you.

Gem is the AI-powered recruiting platform TA teams love. It helps you maximize productivity, hire faster, and save money – all while giving recruiters a solution they find easy to use.

**To learn more and see a demo, visit gem.com**