TAKING YOUR RECRUITMENT SYSTEM GLOBAL—A FIVE-STEP PROCESS TO GETTING STARTED

BY BARRY FRISWOLD, KENEXA, AN IBM COMPANY

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Many organizations wonder how best to take their existing recruiting systems global. The key lies in good, old-fashioned planning. When expanding your applicant tracking and assessment tools to your global populations, a critical first step is to establish the right strategy and approach. Your approach could be as simple as providing training and system access to global users within an organization, it could be an elaborate undertaking like your initial rollout, or it could land somewhere in between. Regardless of the approach, planning up front is key.

At Kenexa, an IBM Company, we partner with global companies to help them reach their recruitment goals. We often see many companies in a steady operational state in one geographic location that are now challenged with expanding the reach of their systems to match their global footprint. The process often starts with a few planning activities that help define the best approach:

1. MAP OUT THE GLOBAL OPPORTUNITY

A key first step is to start mapping out the opportunity without making any commitments. It sounds simplistic, but it is important to document the estimated volume of hires based on country and business unit.

Once you've identified estimated hiring volumes, start filling in more information that tells you something about the recruitment practices in that region, location and business unit. While we recommend undertaking a full survey to reveal a plethora of information, start simple in this initial planning phase and identify the following:

- Is the recruiting done in that location or business unit conducted as a centralized, professional recruiting organization, or is it decentralized and/or done by HR generalists?
- Are third parties involved at any point in the process (background vendors, agencies, etc.)?
- Is there any HRIS system in place for that business unit or geography?
- What are the existing applicant tracking or assessment technologies, if any?
- If there are other systems, has it already been decided to switch to the new systems, or do you need to evaluate switching costs and the benefits associated with the switch?
- What is the best or desired language for candidates, recruiters and agencies? For example, your business language may be English, but to attract the best candidates for particular job classes in one region, you may be led toward posting jobs in candidate languages. It really depends on the business and culture of that country. For this exercise, just make a first attempt at thinking about your organization's language requirements.

No decisions are required at this phase in the process, but by mapping out the global opportunity in a spreadsheet, you start to get an idea of the recruiting picture in each location, and you begin identifying some key scope parameters.

2. CONSIDER KEY DESIGN PARAMETERS

Building on the information you collected in Step 1, the next step is to start thinking about any additional regional, country-specific or other key design parameters that might influence the project. This does not mean you have to undertake detailed process mapping exercises or requirements gathering, but you should begin getting an idea of key design parameters. Usually, when taking an existing system out to a larger, global user base, a common practice is to keep the systems and processes 80 – 90 percent common. The remaining 10 – 20 percent is reserved for those elements that may need to be accommodated at a more local level, such as regional or country-specific laws and regulations. Sometimes these may be related to data privacy, non-discriminatory labor practices, union influences or language requirements. In this step, consider design elements such as:

- *Targeted Candidate Populations Within Scope:* Is the candidate population for the locale or business unit covered under the existing system design? For example, in addition to professional or corporate hires, a region might have a significant hourly, union or graduate hiring need. If so, is this already addressed through the existing systems and programs in place, or is it additional?
- *Data Migration:* If the locale or business unit is using an existing ATS system, does data from that system need to be migrated into the new system?
- *Process Deltas:* Are there any strikingly different processes? For example, how are contracts, offer letters, background checks and other key activities accomplished?
- *Perceived Process or Tool Gaps:* Have the users in the new regions seen the ATS or assessment programs? If so, did they have strong feedback regarding any potential gaps where this might not work for their business processes? If so, was the feedback regulatory? Was it technological, process-related or programmatic in nature?
- *Assessments:* If assessments are part of your existing solution, do the existing assessments for current populations carry over to the new locales and business functions? Or maybe they need to be updated and localized to be effective and applicable to the new users and candidate audiences?

3. IDENTIFY THE STAKEHOLDERS

The third step is to begin identifying some of the regional and business unit stakeholders. In doing so, think about:

- *Country or Business Unit Sponsor:* Is there someone at a policy and/or funding level that is interested in the project and the value it can bring to their part of the business?
- *Fans:* In each locale, are there any fans of the project who are advocates and willing to get engaged? What is the level of their influence?
- *Fighters:* In each locale, is there anyone who poses a threat to the project for any financial, political or personal reason? If so, what is their level of influence?
- *Leaders:* Are there any individuals who might be willing to take on a leadership role—from an HR, HRIS, process ownership, program management, project management or change management perspective?
- *SMEs:* Are there any subject matter experts (SMEs) who can help explain the processes and engage on the project as an SME or change liaison?

Taking inventory of the stakeholders can provide valuable insights into your plan. For example, you may find one country with high volume hiring occurring and expecting for future business growth, but if you don't have the right people in place, the project in that location could fail or be undermined in some way. At this stage of the process, you may realize that your global expansion approach naturally makes sense when segmented into geographic clusters as influenced by these stakeholders. We'll come back to this in Step 5.

4. BEGIN FRAMING THE CHANGE MANAGEMENT PLAN

The flawless execution of a project, in accordance with the project plan, does not guarantee success if there isn't sufficient attention given to change management. In Step 4, think about what elements under the change management umbrella might make the project successful:

- User documentation
- Training
- Communications
- Ongoing support after rollout
- Change leadership and change liaisons

When thinking through the deliverables and accountability assignments, each locale or business unit may present a different story. Some people's experiences in the past may have been better or worse, and that history may be an influencer as you approach people about expanding the recruitment programs globally.

Additionally, training, alone, can be a big deal. It is possible that the region is excited to get on board, but the sheer volume of hiring for that locale could require significant resource challenges. In this case, demand is there, but the delivery mechanism may not be, and the last thing you want to do is rollout major change without the appropriate supplementary training. Also in this area, think about ongoing support. Ask if the model shows that the new region or business unit can utilize the existing support infrastructure in place. If so, does it need to be expanded? If not, what Tier I or Tier II process and technology support might be needed to support the locale? Are there individuals that surface as apparent resources to help support the program after it is rolled out?

Under Step 4, one idea to consider is to rate the country or business units under consideration with respect to general "readiness" to receive, adopt and support the new recruitment program.

5. EVALUATE PROJECT SCHEDULING SCENARIOS

A final step to take in planning for the expansion of your global recruitment processes is to think through possible scheduling scenarios. Begin by reviewing all the information you've collected and documented in the first four phases, and start thinking about what is likely to be a sensible rollout. Get started by looking at your global opportunity grid and asking a few more questions.

Do any of the countries or business units have:

- A high demand or near-term need for the solution being driven by growth patterns, product releases or other factors?
- Any pending legal/regulatory influences driving the need? If so, on what schedule?
- Other one-time program initiatives that are competing for the same resources (e.g. HRIS upgrade, or compensation-Benefits program overhaul)? If so, what is the timeframe?
- Schedule conflicts, such as seasonal hiring program initiatives (e.g. campus recruitment) that pose schedule or resource constraints?

Are there any natural "clusters" of countries or business units that are starting to form based on the information we've gathered in Steps 1 – 4 (location, regulatory, people, etc.)?

Does a "big bang" approach make sense? Or does it make sense to segment or phase the project based on business unit, locale, region or candidate type? The whole "big bang" versus segmented or phased approach is a major consideration that relies on all the information gathered to date. This is also where simple two-dimensional analysis does not apply; it is important to consider layering the multidimensional factors that have been introduced into this initial discovery phase. For example, we started with a two-dimensional grid of country and hiring volumes. We then, however, added languages, design parameters, stakeholders and more factors that all need to be considered together, rather than looking at them as isolated component parts.

In this phase, it is worth putting together a few rollout scenarios to see what might make the most sense. For example, consider the following scenarios:

- Rollout by business unit—All candidate types, countries and regions at once
- Rollout by candidate program—Rollout to all business units for external professional hires first, followed by internal mobility and employee referral, then graduates and finally, hourly candidates
- Rollout by regional clusters of countries
- Rollout by local country—Covering all business units and candidate types within the country at once
- Big bang—All countries, all business units, all languages, all candidate types, all users at once
- Big bang with staggered release—Undertake all design, configuration and testing, but stagger actual release to users based on training schedule, resource availability and other schedule influencers
- Mixer—Rollout by combination of clusters based on some combination of country, candidate type, region and business unit based on some logic factor that grew out of the analysis

There may be pros and cons for each of these scenarios. Weighing these can become challenging, but the information gathered as part of this initial phase usually results in some natural realizations about the right strategy and approach. For example, a staggered rollout might be more controllable for the project team, but it might take more effort with respect to managing communications and websites. Once the scenarios have been framed, weigh the pros and cons with each one, and ask if there are any significant risk factors if the scenario is adopted. If so, what are the costs of failure or setback and could they be mitigated?

We've worked with clients in this position where risks were identified but mitigated through choosing a different scenario entirely or simply developing a specific mitigation strategy for that risk factor. In one example, let's say the big bang might be evaluated to be most desired. But if the risk is that recovery from failure (with so many stakeholders at once) is very high, then maybe a "pilot" or "staggered" approach is developed as a mitigating plan. Under this option, the organization may choose the smaller, more stable plan and increase the likelihood of success for that region or business unit. This regional success can then be leveraged to bring momentum to the phases that follow.

FIVE STEPS FOR SUCCESS

Following the five steps outlined in this planning phase can be an effective way to start framing the strategy and approach for a global expansion project. With the strategic approach established, or at least framed and conceptualized, an organization is then ready to get organizational feedback on the approach, begin building the more formal business case, and commence building a detailed project plan. Regardless of the actual next steps that follow, the information gathered about an organization in these steps can be extremely valuable. Thinking through the project in this linear, interactive and iterative way helps organizations frame the tasks at hand, better understand their organization and provides a project foundation that increases the chances of success. ■

www.kenexa.com
contactus@kenexa.com

ABOUT THE AUTHOR

Barry Friswold

Barry Friswold is the director of consulting and global programs practice. Friswold has 20 years of project management, process engineering, program start-up and customer service experience. For nearly nine years, he has been working with talent management systems. Friswold has overseen technical support centers, developed implementation methodologies, managed CRM implementations and rolled out talent management solutions for Fortune 500 companies. He has lived and worked abroad, and incorporates that international experience in his global role. Combining project and program management with efficient process flow and technology solutions, Friswold has helped customers develop program strategies, prepare comprehensive project plans, create effective change management practices and oversee project rollouts with a keep customer focus.