



## Evaluating Usability for Talent Acquisition Systems

### Executive Summary

Selection of a Talent Acquisition System (TAS) can be a very complex process, given the maturity of the industry and the number of solutions on the market today. The most effective way to ensure that the selection process for a Talent Acquisition System is objective and systematic is to use 'decision drivers'. Decision drivers typically include both product criteria, such as functionality, usability, integration, technology, scalability, business segmentation and global capability, and vendor criteria, such as viability, pricing, services and product vision.

While all of these decision drivers are valuable in comparing systems, we've chosen to focus on evaluating Usability in this white paper because it is one of the most heavily weighted, and yet misunderstood decision drivers in system selection.

When evaluating usability within the context of talent acquisition systems, reviewers would be best served to take a broad view of usability: moving beyond simple appearances (look and feel) and examining not only the form, but also the function.

True usability answers this question: Does the software help recruiters, managers, and candidates complete the hiring process more efficiently AND more effectively?

Since usability is the decision driver that is the most difficult to understand, this white paper breaks the process down systematically by first examining how experts define usability, then looking at how to effectively employ usability as a decision driver in a selection process, and finally, how to objectively evaluate usability when reviewing competing talent acquisition systems. For the last section, we have identified six key real-world usability factors to consider in your overall selection process.

## Usability: Defined by Experts

“Usability is a quality attribute...defined by five quality components: Learnability, Efficiency, Memorability, Errors, and Satisfaction. There are many other important quality attributes. A key one is utility, which refers to the design’s functionality: Does it do what users need? Usability and utility are equally important: It matters little that something is easy if it’s not what you want. It’s also no good if the system can hypothetically do what you want, but you can’t make it happen because the user interface is too difficult.”

—Jakob Nielsen, Usability 101, useit.com

“Good design is founded on a deep understanding of both broad human characteristics and the specific intentions of a particular constituency, so that it can marshal the appropriate information, processes, and technology to allow those constituents to achieve their goals, both professional and personal.”

—Alan Cooper, The Church of Usability, builder.com

## I. Defining Usability

What is usability? Software usability means many different things to different people. Each person brings a distinct perspective to discussions of usability. What is considered usable to one person may be in fact viewed as problematic to another. The lack of general agreement can make software design a challenging process for vendors, and selection a challenging process for companies with many different constituents.

One example of a classic usability debate that can lead a company astray is whether the system should display more information on one page or whether the user should view multiple pages with information segmented along topical lines. Within a Talent Acquisition system, an example would be creating requisitions: some users will prefer to see all the information on a single page that contains all the forms. Other users may feel that it is preferable for the system to guide them through the process in steps associated with the various components of the requisition.

Ultimately, either approach will work. The real questions to debate are not how the system presents data, but how much flexibility does it have to enable page layout definitions? Can you configure the solution to display information in a way that makes sense to the most users?

When evaluating interfaces, leading experts in the field of software usability are placing less emphasis on the cosmetics of a given UI and are focusing more on the following notion – a system is usable if the user can accomplish the business goal(s) within the context of a structured process. First impressions and appearances are important, but are often weighed too heavily when users are seeing a product for the first time. What may look sharp in the initial demo(s) may not necessarily be the best long term solution for the organization. In time, any initial excitement related to a pleasing appearance and color scheme typically wanes in comparison to the reality presented by needing to use the solution on a daily basis.

To facilitate an objective and consistent way to evaluate usability, it is important to define it up front, prior to seeing any solutions, and to agree upon how your team should approach this aspect of your evaluation.

For users of talent acquisition systems, usability definitions might include the ability to acquire talent for the organization easily, quickly, and effectively, and the ability to support the long-term goals of each job function, department, and organization? Each company must determine for themselves the key areas that determine success.

## **II. Usability as Decision Driver or Avoiding the ‘First Impressions’ Trap**

How should usability fit in with other decision drivers? Without a structured evaluation process, an undefined notion of usability can rise to the top of the criteria list on an emotional wave. Product usability should be treated like the other decision drivers—it should be clearly tied to the specific goals of the organization. Everyone should understand how to approach the usability decision driver appropriately.

But, how can usability be quantified? Older approaches typically positioned usability within a framework of contrived metrics, such the number of:

- Mouse clicks to complete ten random transactions.
- Discrete steps in the hiring process approval workflow.
- Minutes it takes to complete a new requisition.
- Possible hypothetical reports that can be produced.

Or they devised a popularity contest:

- Does the structure seem logical to hiring manager Richard?
- How easy is it to navigate for Jane the head of HR?
- Will Betty the recruiter like it?

Focusing on these criteria may help you measure likeability. But they tend to ignore and underemphasize the more important criteria that are directly related to the actual objectives of operational efficiency and productivity. There are more important factors that need to be included in a true usability analysis that are not tied to numbers or random taste tests.

Rather than counting the number of clicks it takes to perform a given task (one of the most commonly used evaluation measures), ask your evaluation team these important questions:

- Is the system organized intuitively and is it able to be easily configured to adapt to the changing needs of your business?
- Does the software provide features that help users (recruiters, managers, and candidates) complete their respective tasks more efficiently AND effectively?

Another way to get off track when measuring usability is to assume that a system that is not immediately intuitive cannot be learned. Systems that appear to be easy to learn or easy to use initially, can fail to make recruiters, managers, and candidates more productive and effective in the long run. Transactions may take less time, but users are forced to repeat them or go outside the system to accomplish the full task. The solution must actually support the recruiting process and manage the candidate and requisition pipelines efficiently.

Review of navigation and intuitiveness are important, but operational efficiency should be the higher priority. A poorly designed process and interface can sink system adoption rates, but what some solutions lack in intuition, they deliver in ROI. They can be learned and adopted quite easily if larger gains in improved organizational productivity are identified and highlighted. It is critical to ensure that the key issues of productivity, operational efficiency, and meaningful results are not relegated to a secondary status behind user interface issues.

In summary, be sure to consider usability in the context of your other decision drivers and your overall goals for the project. Strictly narrow or anecdotal definitions of usability can lead organizations to make knee jerk decisions based on factors that are often not as important as the larger business drivers and process enablers.

### **III. Evaluating Usability: Six Key Criteria**

If overall usability is a combination of navigation and productivity enablers, what is the best way to evaluate a talent acquisition product's true usability? The following list examines six key areas to consider when evaluating usability in a Talent Acquisition System:

#### **1. Configurability**

##### **1a. System Configurability**

Most systems will have some level of flexibility built into the software, but it is important to examine and compare the degree of configurability. A truly usable system accommodates not only the specific needs of the company, but also the specific needs of different groups and individuals. Usable systems include a robust dashboard or user interface for the system administrator to change settings as business needs change.

Examples of configurable functions:

- Define new data fields.
- Redefine field labels.
- Change presentation formats.
- Build multiple workflows.
- Configure career site display and workflow.
- Update user security and permissions.
- Change candidate source codes.
- Define offers and requisition approval paths.
- Create user groups for shared functionality.

##### **1b. Saved Personal Settings**

A key sub-component of configurability is the ability for individual users to define and save personal settings for displays and filters. For example, some users may not want to see disqualified candidates on their requisitions, while others may want them listed last. This is particularly important for companies that are large and/or globally distributed.

For example, can users:

- Define data presentation rules on application pages?
- Select specific fields to display on lists?
- Create context-specific lists?
- Sort and filter data dynamically?
- Save filters and settings when the page is refreshed?

##### **1c. Requisition and Candidate Views**

Most systems provide summary and detailed views of candidate and requisition pipelines or lists. As with any view of data, users should be presented with as much relevant information as possible on the first page to prevent them from having to keep drilling deeper. Information presentation management is a critical usability issue.

Questions to consider include:

- Are these views dynamic or static?
- Can the user configure viewable data elements?
- Do users have enough data to make immediate decisions?
- Can users take action directly from the lists?
- Can the user drill into candidate or requisition data details?
- Do colors or icons help distinguish candidates, requisition types, or statuses?
- Can users sort or filter candidates according to job match or pre-defined ranking/relevance?

The value of configurability is more easily identified in its absence, which is why it is sometimes overlooked. The more settings and switches a system has, the fewer compromises each user has to make to accomplish their goals. These compromises add up over time and have a major impact on usability.

It is also important to understand that configurability is not the same as customization. Customization is often a substitute for configurability. While it may appear to make the system more usable initially, it rarely addresses the changing needs of a business effectively over time.

## **2. Managing Data Volume**

One of the most serious challenges facing organizations is the task of managing volumes of data. The amount of information maintained in talent acquisition can be overwhelming. Your ability to access relevant data at the right time can make the difference between success and failure. The next several items all help users effectively manage large volumes of data.

### **2a. Information Presentation – Push vs. Pull**

Most talent acquisition solutions include search and reporting tools to find and analyze data. The more effective and usable solutions push information to the user rather than making the user pull it from the system. Candidates want notification when new jobs are posted that meet their search criteria, recruiters need updated candidate lists, hiring managers look for candidates with specific skills, and business heads require exception alerts.

Key things to look for include:

- Can users set up alerts based on pre-defined criteria?
- Can the system be configured to send alerts or notifications based on specific events in the selection process?
- Do email notifications/alerts include key information and/or links that take the user to the information they need?
- Can users configure the data elements they want the system to push to them?
- Are there rules, thresholds, or filters to eliminate data that does not meet specific criteria?

An example of this feature is the ability to push high quality candidates to recruiters and hiring managers as soon as they apply—minimizing the need to search for candidates associated with a requisition or specific position. The more you put subscription definition abilities into user hands, the more usable a system becomes.

### **2b. Mass Actions**

Another critical element of usability relates to mass action capabilities for candidates. When activities are done as mass functions, the process becomes much more efficient.

Verify the following items:

- Can a recruiter disposition a candidate against multiple requisitions as a single action?
- Is the mass action list consistent across the application or does it vary depending on where the user is in the system?
- Can you associate correspondence with mass actions to further streamline the process?

The degree to which a system can support this functionality will greatly increase usability by reducing or eliminating repetitive activities.

### **2c. Automation and Removal of Manual Data Entry**

One of the key objectives in implementing a talent acquisition solution is minimizing data entry, and particularly duplicate data entry. Automated processes and online technology should both capture and reuse candidate selection data. The more you remove users from data entry, the more accurate the data is and the easier the system becomes to work with.

Review these questions:

- Does the system effectively use system templates to auto-populate requisitions, including job descriptions and compensation guidelines?
- Does the system include copy functions throughout, so users can copy and modify requisitions, correspondence, etc.?
- Are there data validation prompts presented to the user to ensure that copied data elements are still active such as job codes, departments, and locations?
- Does the system prompt or automatically save data when leaving partially filled screens (to prevent data loss)?
- Can the system use data captured in the application process to populate forms?
- Is all data captured in the system available for export to external systems?
- Can the system be set up to automate certain repetitive actions such as automatically rejecting all remaining candidates when a job is filled?

The degree that duplicate data entry can be eliminated by automation has an enormous impact on the usability and effectiveness of the solution, enabling users to spend their time on more strategic tasks rather than simple data entry.

### **3. Candidate Usability**

While candidates are not daily users of a talent acquisition system, they are important usability constituents. If candidates do not find the career site usable, they may not complete the application process. Another example of candidate usability involves the layout of pre-screening questionnaires. A truly usable solution will present only the appropriate amount of information to the candidate based on their responses.

Some items to consider include:

- Does the system present additional questions only if the candidate has qualified to move on?
- Is a positive message presented for candidates that do not meet the defined threshold and are not provided the option to continue the process?
- Can candidates easily search and find jobs based on their own interests?
- Can candidates save job search criteria?
- Must candidates re-enter information for each job or can they store and reuse a profile for each application?
- Can you customize the career site to reflect your brand?
- Does the system include resume parsing technology to reduce candidate data entry?

If the system cannot provide a good candidate experience — which most often means a streamlined intuitive application process framed around provided information — then it will not be used and applicant flow will be poor.

#### **4. Collaboration**

How the system is structured to facilitate collaboration with various stakeholders in the selection and hiring process is also important.

Does the system:

- Automate the push of email communication to managers, recruiters, and candidates based on hiring process events?
- Include key information or dynamic links on emails so users can easily access the needed information?
- Enable managers to communicate feedback, questions, issues, or concerns to members of the hiring team?

#### **5. Reporting & Compliance**

All solutions include reporting capabilities. But the most usable systems will provide the type of data you need to make better decisions throughout the system, as well as collect the data that is required to comply with local and global regulations.

Key usability issues include:

- Can candidate data be secured according to global privacy laws?
- Can compliance data such as EEO be collected at various stages within the process?
- Can candidate searches be easily saved according to OFCCP guidelines?
- Can system users determine which reports they want to display on their dashboard?
- Can users define custom reports that display on their dashboard?
- Can users define rollup reports with drilldown capabilities for department breakdowns?
- Does running reports affect system performance?

If the system supports this functionality, the organization will realize significant time savings associated with compliance and analytical reporting.

#### **6. Global Considerations**

This may not seem important for companies that only recruit and hire within a single country or region, but with the world changing rapidly to a globally economy, even small companies often find themselves sourcing talent from other countries. Generally, the first consideration is for global candidates, but for growing companies, it is wise to consider a system's ability to properly store and present data to users in different parts of the world.

For example:

- Can the system automatically filter out data such as source codes, requisitions and candidates by country or region?
- Can the system support store/segment candidate data by country or region according to local privacy laws?
- Can candidates select their native language on the career site?
- Does the system support multiple currencies?
- Can users view data in their own time zone?

A system that is unable to handle the types of items above may turn out to be usable for some, but not all of your key users.

## **Conclusion**

Too often, usability reviews do not move beyond the cosmetic surface to address the more critical process issues of operational efficiency and effectiveness. But, as a key decision driver, usability should be considered within the context of both function AND form. Software is not truly usable if it does not enable the users to become more effective in their business processes—with easily learned navigation and efficiency drivers such as automation or mass actions. To derive maximum value and ROI from a talent acquisition solution, usability should be considered with a long term view to accomplishing business goals.

It is also important to understand the philosophy and approach to design that your short listed vendors subscribe to - is there a structured, methodical, and iterative design/testing process that takes into consideration multiple perspectives?

You owe it to your organization to perform a usability review that includes the six key areas of usability outlined in this paper. This systematic approach—although it will take more thought and planning—will drive a much more accurate appreciation for the true usability of the solutions under consideration.

**About HRchitect**

HRchitect is the premier Human Capital Management (HCM) Systems consulting firm and the market leader in Talent Management Systems (TMS) consulting services including the selection, implementation and integration of Applicant Tracking Systems, Performance Management, Succession Planning, Career Planning, Compensation Management, e-Learning and Competency Management Systems.

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