

Pinpoint



# RFP Guide

How to find the right **ATS** for  
your organization.





## Why is it important?

There are 450+ ATSs on the market and they'll all say the same thing: they can help you hire better, faster, and cheaper.

This much choice can be overwhelming for buyers, so before rushing to select a partner, why not stop and examine the selection process itself.

Taking some time to consider what you are trying to achieve, what success looks like and getting internal buy-in will lead to a more successful and longer-term partnership.

A structured approach ensures you don't make mistakes in your procurement process and avoids delays or unsuccessful partnerships.

## Features of this document

This guide will help you to find the right partner for your recruitment activities, so you can make a success of this initiative.

This guide includes:

1. Guiding principles and considerations to help you run a smooth process, without any nasty surprises.
2. Two RFP templates to choose from that you can use as a starting point for your RFP process. These include questions that will help make sure that you get the most out of your investment.
  - a. A full RFP template in an excel format attached alongside this guide.
  - b. A mini-RFP template for a shorter process with fewer requirements and more open-ended questions.

If you have any further questions, or would like to schedule a call with our Bid Team to discuss how to structure your procurement processes, reach out to our team at: [sales@pinpointhq.com](mailto:sales@pinpointhq.com)



# Guiding principles and considerations



## Clearly Define Your Objectives

Know exactly what you want the outcome to be and state it. Think about what specific problems the new tool needs to solve and what success would look like for this project.


Often buyers try to over-engineer the solution, so it's vital to keep the end result in mind and allow providers to make suggestions.

## Set a Clear Timeline

Think about when you need to implement the new solution and work backwards from there. Make sure to consider:

- If you want to receive good bids from your vendors, give them enough time to answer. You should give at least two weeks for vendors to complete your RFP.
- When you send out the RFP, include the dates that you will conduct final demonstrations/pitches. This allows vendors to plan and ensure they can allocate resources.
- Factor in time for you to clarify vendors' proposals.
- Set yourselves a deadline to review bids and shortlist suppliers. The longer a procurement process drags on, the more likely you are to end up cancelling or not making a decision. Be intentional and stick to internal deadlines.
- Leave contingency for legal, compliance, infosec etc.

If you consider all of the above when building your RFP, you will receive better quality bids and give yourselves the best chance of hitting your desired launch date.





## Know your Budget and Factor in all the Costs

Know your budget and how much wiggle room you have. This will save you and potential suppliers time in the final stages of the process.

Also consider that your engagement budget is offset by improved business performance, such as automations that reduce manual admin time or reduced agency spend.

Remember to include ancillary services like implementation, training and support. You don't want to be stung by rising costs midway through the contract.

## Consider Future Enhancements

Anticipate functionality that you might need in the future. This could be different licensing packages, optional modules, or an exciting product roadmap.

Changing providers can be time consuming and costly, so future proof your investment by partnering with a forward-thinking provider with an innovative roadmap.



## Engage Internal Stakeholders and Gather Their Requirements

Engaging the right people early will speed up the process.

Speak to stakeholders from:

1. Talent - Own and run recruitment and will need to be advocates of the solution.
2. HR system owners - whether this is an HR Ops team or it sits in IT, engage the people who own your HRIS and gather their requirements. If you also want to integrate your payroll and onboarding processes, engage the people who own those systems and processes too.
3. Hiring Managers - If hiring managers don't effectively use your ATS the project will fail. Consider their use-case to ensure you can get their buy-in.
4. IT - Will define your privacy and data security reviews. They can also help with the integrations you require.
5. Legal - Engaged legal teams will streamline the contracting phase.
6. Change Management - If your organization has a change management or PMO function, engage them and get their support with managing the process of implementing a new system and, if applicable, transitioning from your existing system.

## Ensure Security and Uptime

Often due diligence around security is brought in at the final stages. To speed things up and avoid last-minute deal-breakers, ask about security policies, certifications, processes, GDPR, uptime history, maintenance procedures and so on before you select a preferred provider.

## Set Evaluation Criteria

Prioritise functionality that is most important to your needs, don't get distracted by features not linked to your overall objectives.

Assign priority weightings, such as solution 70% and price 30%. Also make it clear which requirements are essential and which are nice-to-have. You don't want to waste time reading a proposal only to find the provider doesn't meet some essential criteria.



## Understand the Implementation Process and Timelines

Ask about the typical implementation process, examples of similar deployments, key project risks and dependencies. This will be fleshed out further following contract award but it's important to know what to expect and how much support you'll receive. Here it's important to flag critical milestones for your business.

## Always See Multiple Demos

You'll never fully understand the product without seeing it in action. You should see demos before inviting providers to the RFP and again after reviewing their proposals.

For the post-submission demo or pitch, try to allow at least 90-minutes per provider. Consider using slipstreams for discussions around specific aspects that you want to understand further. Not everyone needs to be in the room at the same time but ensure that your key decision makers have seen a demo so they are well informed to make the final decision.

## Consider Culture and Values

If all solutions did roughly the same thing, what would help you decide? Often the answer to this is cultural fit. Ensure your provider is aligned to your organization's culture and the values you look for in a successful partnership.



RFP templates  
to help get  
you started







## Full RFP Template

Collating all of your requirements can be a confusing and time-consuming process.

To make things easier, we've created a **full RFP template**, available as a Google Sheet.

▶ [Open the RFP Template in Google Sheets](#)

**The template includes a combination of:**

- **Longer-form, open-ended questions.** These give bidders space to explain why they're the best provider for you and to share any supporting detail or visuals (e.g. implementation plans or user journeys).
- **Short-form, closed questions.** These use yes/no/partial responses with an optional comment box. This is ideal for confirming standard ATS functionality without wading through pages of documentation.

This mix of question types helps bidders present their solutions in the most compelling way, while ensuring you gather all the information you need to make an informed decision.

Before sharing it with vendors, make a copy of the Google Sheet and **modify, add, or remove questions** to suit your organization's specific needs.



## Mini RFP Template

If you'd prefer to run a shorter process, with fewer requirements, the following questions will help you get a good sense of which suppliers you want to shortlist. You should supplement this list with your own infosec questionnaire.

1. Why should we choose your solution?
2. Describe your experience supporting organizations in our sector
3. Set out the user journey for:
  - c. Platform administrators
  - d. Hiring managers
  - e. Candidates
4. Describe your functionality related to:
  - a. Organizational structure management
  - b. User management
  - c. Careers site
  - d. Application processes and forms
  - e. Job management (templates, workflows etc)
  - f. Requisition management / approval to hire
  - g. Candidate profiles
  - h. Interview process management (scheduling, templates etc)
  - i. Offer management
  - j. Employee referrals
  - k. DEI management (EEO compliance, reporting, redaction etc)
  - l. Talent CRM
  - m. Job advertising
  - n. System configuration and automation
    - i. Does your solution have a dedicated workflow automation tool?



- ii. Does your workflow automation tool enable unlimited layers of conditional logic?
  - iii. Please provide three examples of automations that you think would be highly applicable to our organization.
    - o. AI
    - p. Data privacy and protection
    - q. New hire onboarding
    - r. Reporting and analytics
    - s. Integrations
- 5. Provide an indicative implementation process and timeline
- 6. Outline your support offering
- 7. Outline your approach to training
- 8. Provide your pricing proposal, including:
  - a. Any optional modules
  - b. Support and implementation fees
  - c. Any limitations on users or usage
  - d. Any integration fees
  - e. Any other associated costs



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