Oracle Telesales meets Oracle HRMS – A powerful boost to both sales and recruitment

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Prologue

The hunt for quality resources is every much as fierce as the competition for sales. The 21st century finds us on a planet shared with 6, almost 7, billion other inhabitants, but when it comes to the increasingly specialized and complex competency combination profiles we need to succeed in the modern age, it can feel like we are searching for someone who may not exist. Why can't I find a decent business analyst in my backyard to fill my vacancy? Long ago, the best candidates ceased to apply to your Sunday newspaper ads, then web job postings. However, they are out there just waiting for the right opportunity. But the paradigm of applicant/employer has changed and shifted in the power balance. They no longer 'apply', they are solicited and sold on opportunity, much as sales has learned to do with products and services. Enter the age of the headhunter and the winners of the talent wars will not be the meek.

Now this may not apply universally to all companies. Some, such as Google or GE have an eager pool of applicants waiting for an opportunity to work for such prestigious names. But even these share some of the same pains felt by mid-sized companies such as the one I work for, IT Convergence. This shortage of labor is felt the most acutely in the areas of executives, top performing sales persons, and highly experienced technologists and specialists.

This white paper explores the systematization of the recruitment techniques commonly known as 'headhunting' and how a professional service organization aligns demand with supply.

Introduction

Some would say that Sales are the motor that drives business, but I would dare to say that you need a top sales person or two before that can happen. One of the business development cycles primary stages is recruitment and it is second only to the founder's development of the company's vision, mission and values.

In this presentation, we will talk about how we turned Oracle CRM system into a Candidate Relationship Management system. This session focuses on using Oracle Telesales and HRMS to strategically align sales and recruitment processes for professional services organizations. Organizations that headhunt the best talent generally encounter applicant tracking systems that lack OTS' robust contact management capabilities. Learn how OTS can be customized to integrate Competency-based Suitability Matching, Recruitment/Sales pipeline reporting and applicant tracking within HRMS.

Degrees of Relationships

IT Convergence is a professional services company specializing in Oracle expertise. Like most entrepreneurs, our founder reached out to his close circle of family, friends and colleagues when he decided to strike out on his own ten years ago and create a new consultancy. This immediate network of trusted people he had existing relationships with formed the first channel to fulfilling the resource needs of the new company.

As the company started to win contracts and new clients, the immediate circle of contacts quickly gave way to the second channel, referrals from employees. This was still a fairly safe bet, the employees could vouch for a candidate's ability, but less reliable that the direct relationship with the founder.

The third channel we quickly began tapping as the business grew was the candidates with whom we had no existing relationship. These outside network candidates can be divided into two categories, the applicant and the contact. It is specifically for these person types which we needed a robust and efficient Candidate Tracking System.

Legacy Candidate Tracking Systems

Like many self funded start-up companies, we began our CRM database with simple programs like ACT and the Goldmine. These offered simple and cost effective solutions for contact management, but virtually no functionalities for sales and recruitment pipeline management. In March of 2001 we converted to PC Recruiter for both sales and recruitment functions. PCR is a boutique Applicant Tracking software which offered great capabilities on the recruitment side, but fairly limited sales process and forecasting functionality. As the corporation grew, we began to be limited by our inability to accurately track and predict our revenues. By mid-2006 we had reached 40 million in annualized revenues, and it became apparent that we would need to migrate to a CRM product capable of delivering accurate sales forecasting if we wanted to continue growing and manage within budgets.

I was very apprehensive of losing the great database we had build of contacts in the industry (we had nearly 150,000 contacts and close to 100,000 resumes). Furthermore, our discipline to accurate data entry and business research had allowed the software's name association functionality to map out the relationships between many people in the industry (referrals, references, interviews, relative, co-worker, etc) and proved to be an awesome tool for seeking out specific talent similar to Linked In or other social networking sites.

As an Oracle Applications consulting company, our goal was to map out all of our business processes into Oracle. We had completed an implementation of Oracle Financials in 2004, followed by HRMS in 2005, and Project Resource Management in 2006. The obvious choice to map out our recruitment processes would be to iRecruitment, right?

Challenges with Traditional Applicant tracking systems

There were several barriers we saw to using iRecruitment as a way of addressing our recruitment business model. Most of challenges arose from splitting the sales and recruitment data history in the system.

Firstly, we were concerned about the way sales and recruitment worked together to staff projects. As a young and ambitious company, we would often go after projects which required recruitment to fulfill the project staffing needs. As a company reliant on our own profitability to grow, we were unable to hire a large resource reserve without a clear pipeline for the competencies the consultants possessed. The sales cycle was closely aligned with the recruitment pipeline and the use of a single contact management system was seen as a strategic value. We had gathered thousands and thousands of contacts' information and resumes and had developed a relationship history with many members of the Oracle Community both as candidate and other times as client. A single database gave us access to the contacts entire historical record with the company and enabled us to best leverage our relationship to further the contact and company's best interests.

Secondly, we felt our knowledge of the candidate's relationships within the Oracle community as a whole was a way of validating experience and providing us with the opportunity to solicit references about the quality of the resource. Our sales force had created a large amount of contacts with hiring managers and executives throughout the industry; these could be used to check the work experience of our candidate pool in order to better understand the abilities and potential fit with ITC.

Thirdly, the networking processes of the recruitment function also served to support the salespersons business development activities by sharing information about Oracle projects the candidate were on. This allowed greater visibility into the opportunities in the marketplace. When leads were generated through the

recruitment pipeline about project activities and potential opportunities, the salesperson could leverage an insider viewpoint from the candidate to solicit business.

Lastly, we had a huge database of resumes built by downloading all resumes from online resume posting sites like Monster, Dice, Hotjobs, etc. Combined with the recruiters' cold calls, networking and headhunting activities, we had a great database to understand the Oracle market's install base and candidate pool. Our business research function did regular mass imports of resumes designed to feed both the sales and recruitment knowledge base. The pricing model for iRecruitment was based resumes and this did not seem like a good investment for our business strategy.

Oracle Telesales as a Centralized Business Development Platform

iRecruitment would have separated the unified view of our business development efforts we had grown to use as a strategic differentiator and additionally not seen as cost effective. If we wanted to fulfill our company's mission to use Oracle as a single point of truth yet continue our successful business model, we needed a solution that was outside of the box. We decided to try to fulfill our requirements using Oracle Telesales.

Telesales offered the robust contact management features and relationship association between contacts of our legacy system, plus extraordinary sales pipeline management functionality. It offered easy customizations through the use of descriptive flexfields for things like salary and skill data which could also be restricted by user responsibility. We could relate recruitment tasks to sales opportunities to create a unified view of the business development campaign using just-in-time recruitment methodology.

We faced a few serious challenges to adapting the system to a Candidate Management System, however. When we first went live with Oracle Telesales in January of 2007, the resume search function was so slow that it could take up to 30 minutes to receive the results, and in the meantime the whole system latency became a problem. We were forced to run the PCR in parallel for 4 months using it for the search functionality while using OTS for contact management. In this time, our IT leadership developed some innovative solutions to the system.

System Customization Challenges

IT Convergence's dynamic Oracle Telesales-HRMS sales-recruitment solution features several modifications to the architectures of the Oracle Telesales (OTS) Universal Search and a "Contact to Applicant" interface between OTS and Oracle HRMS.

When IT Convergence (ITC) first examined the possibility of developing a solution to support a dynamic sales-recruitment pipeline, it was clear that there were some gaps between the company's needs and OTS' standard Universal Search functionality. The "out of the box" OTS Universal Search functionality is rigid and complex. As figures 1, 2 and 3 reveal, the key search fields that ITC needed to use were separated on multiple screens and, while OTS offered the possibility of saving searches, it does not easily allow a recruiter to make key candidates instantly available to a recruiter.

Figure 1

Figure 2

Figure 3

Figure 4

To resolve this issue, ITC developed the "ITC Universal Search" which unified search fields onto one screen, with tabs devoted to sub fields relevant to both the sales and recruitment processes. The "ITC Universal Search" allows users to make flexible searches, for example a recruiter could do a search for all contacts in OTS who reside in a certain state and who had a certain skill set and a specified education level. The ITC Universal Search not only allows recruiters to save the results of this search for future reference, but it also greatly facilitates a recruiter's ability to focus on a filling a specific need, as candidates found in searches can be added to a "My Buddies" tab, where they will be instantly available.

Figure 5
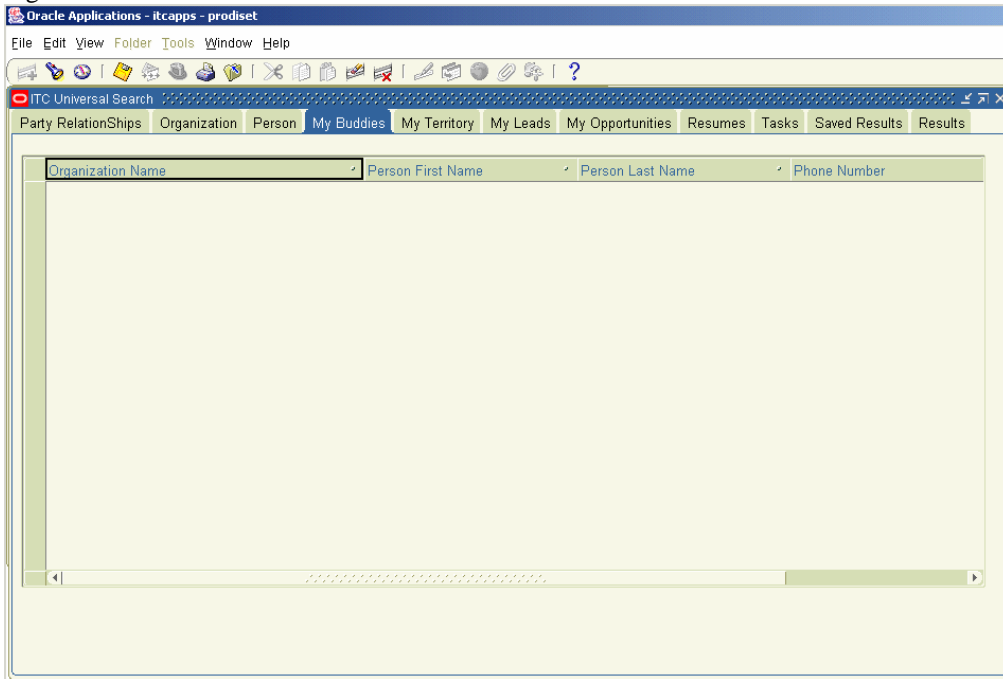
The architecture of ITC's OTS-HRMS solution also features an innovation that allows each contact in OTS to have resume file associated with it. In fact, as figure 6 indicates, a separate resume tab has been created for each OTS contact. Resume files can be in any format, such as html, MS Word or PDF. Recruiters can conduct targeted searches of the resume database. As can be seen in Figure 6, for example, a recruiter can go to the "ITC Universal Search," click the "Resume" tab, and then search all resumes in a zip code range that meet the criteria in a search string by adding such as "Oracle Financials AND Oracle CRM OR Oracle HRMS." Moreover, the key search terms will be highlighted in each resume. The recruiter will then be able to either save the results of this search for future reference, or add key candidates to the "My Buddies" tab.

Figure 6

The final architectural modification to OTS in ITC's sales-recruitment pipeline solution is the "Contact to Applicant" interface. This interface allows recruiters to automatically convert that status of contacts in OTS to "applicant" by creating the proper relationship. Adding the "Applicant of" relationship not only flags the contact as an applicant in OTS, it creates a record in Oracle HRMS for the applicant as well. Therefore, when the applicant accepts an offer and becomes an employee, the recruiter can change the status in OTS to "Employee of" and, when this happens, the status of the new employee's record is automatically updated in Oracle HRMS, and the human resources department receives an alert informing a new hire needs to be processed.

The "Contact to Applicant" interface is completely automated, and allows a company to establish "One Source of Truth" for all employee data at the very beginning of the recruitment cycle. There is no need to create duplicate records for recruits and new hires, no need for recruiters to send e-mails to human resources when an offer is accepted, no danger that the email will not get noticed or be accidentally deleted.

The architecture of ITC's OTS-HRMS solution allows either recruiters or sales representatives to associate sales opportunities with open positions. Tying vacancies to sales opportunities allows an organization to register all tasks related to both the vacancy and the opportunity and store them on one central location.

Future Telesales, Project Resource Management and HRMS Plans

Our work with Oracle as a Candidate Management System is on going. We have developed a list of process tasks which will allow us to track the candidates submitted to a position, the interview process, reference checking and offer stages. When these tasks are related to a vacancy, we can see the collective activity and candidate pool for each HRMS vacancy. We are in the process of developing Noetix reports to pull this information out of the system in a usable form.

We currently use Project Resource Manager for booked revenue/projects and managing the consulting resources availability. We are interested in expanding the use of that system to the business development cycle. When a sales pursuit reaches a certain level of closure confidence, the staffing requirements will be

entered by a resources manager into PRM to match supply and demand; using the system to first check employee availability, followed by applicant availability, and finally contingent worker availability. If a certain competency profile is not in our pipeline, we then open a new vacancy for the position.

Our company currently does not use the competency feature until after an employee is hired, we look forward to implementing competencies into the candidate evaluation process for use in PRM staffing nominations as well as getting the most out of the Suitability Matching feature of Self Service HR.

In addition, we are re-evaluating the use of iRecruitment for applicant tracking. We would keep the contacts in the OTS system until their skills match an open vacancy in HRMS and they state they wish to be considered for the position. At that point, the standard Applicant Tracking functionalities of iRecruitment look to be a valuable tool in evaluating the candidacy within the context of competency frameworks, providing a pre-employment process tracking system, and allowing us to customize vacancy competency profiles. With Oracle Telesales handling the bulk of the headhunting sourcing process, we now see the value in iRecruitment at the traditional applicant phase of the process.