

@eploy



**EPLOY IMPLEMENTATION METHODOLOGY**



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# Your roadmap for online recruitment success with Eploy



Eploy's proven project methodology provides you with an implementation plan centred on your unique recruitment requirements.

The Eploy Implementation Methodology is both scalable and flexible, making it ideal for both complex and simple implementations of any size.

We've built our methodology upon the experience gleaned from working with thousands of recruiters, in organisations from 100 to over 100,000 employees.

## Objectives

The Eploy Implementation Methodology is designed specifically to streamline and standardise the implementation process, reducing both time and cost. By standardising our processes we ensure that you receive the system you have agreed to, within the agreed time frame, allowing you to focus your attention on your critical recruitment functions.

Eploy's Implementation Methodology provides a practical approach to:

- Identifying the activities required to complete the implementation process.
- Creating guidelines and time frames which you and your Eploy Implementation Manager must adhere to.
- Creating document templates which must be completed at each stage of the implementation.
- Creating standard procedures and checklists to help you manage the process.

## Our Implementation Team

- Works closely with customers and partners to ensure successful implementations and customisations of Eploy Recruitment Software.
- Has over 40 years combined experience of implementing recruitment solutions.
- Guides clients through every step of the implementation, bringing forward functional and technical knowledge that delivers successful results.
- Provides the highest levels of customer service.



# The 4 Ps of a successful recruitment transformation project



At Eploy we recognise that technology alone can not ensure recruitment transformation success. That's why we have a methodology in place that is proven to deliver real business benefits to our clients.

Our methodology is built on four key pillars, the 4 Ps, people, partnership, planning and process.

## People

Your Eploy Implementation Manager will be by your side to guide you throughout your project. Our Implementation Managers typically have a HR and Recruitment background, they have each worked on many projects similar to your own, they are fully versed in modern project management methodologies and are augmented by specialists in areas such as training and integrations.

## Partnership

We have an open and honest culture at Eploy which we will bring to the partnership. We are not afraid to challenge you if we feel there are ways of working or process changes that will transform your recruitment for the better

We collaborate with you throughout the implementation using the online platform -Teamworks Project. Meaning, you will always know what is going on, we can spot any potential blockers early and put corrective actions in place.

## Planning

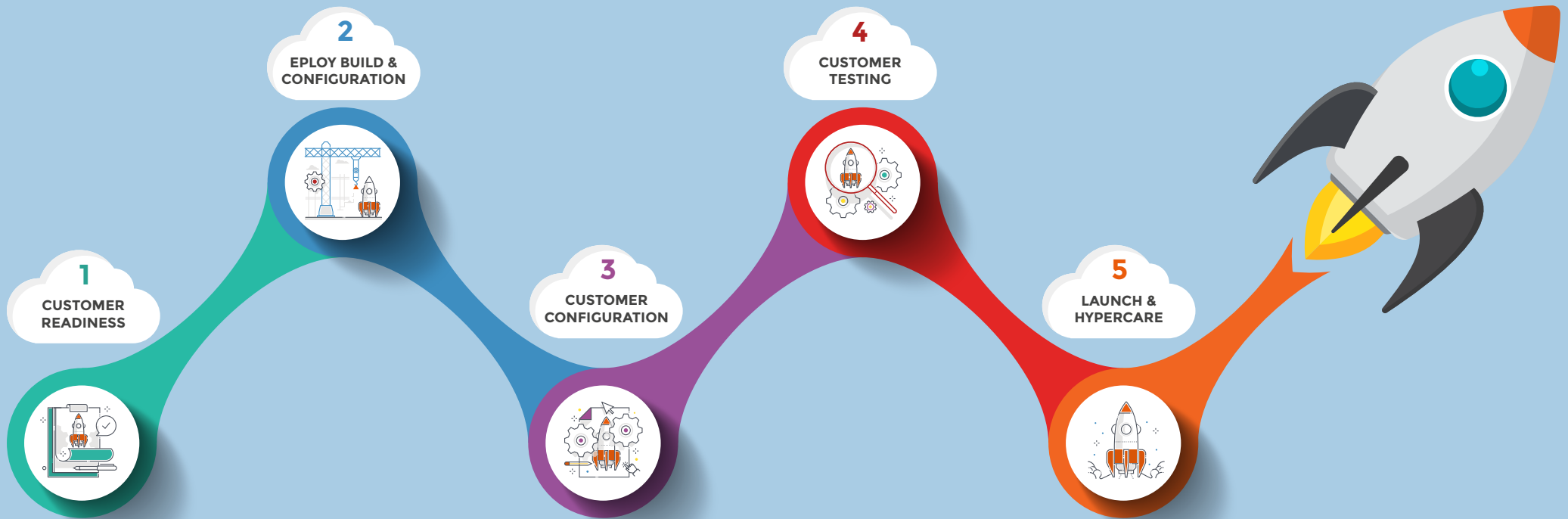
We plan for success from the outset, this means we will ensure we fully understand your goals and objectives and what success means to you.

We'll also ensure that we've prepared you throughout the journey, making sure you know precisely what you need to do at each stage, so that the project remains on track for a successful, on-time launch.

## Process

The Eploy implementation methodology has been honed and refined over 400 system implementations, we do not rest on our laurels and are continually seeking new ways to refine the customer experience.

# YOUR IMPLEMENTATION PROCESS







## Benefits

The main benefits of using the Eploy Implementation Methodology are:

- We will complete the project on time.
- We will complete the project within budget.
- Your Eploy system meets your expectations (as documented and agreed in advance of the start date).

## Pre-Project

During the Pre-Project, your Eploy Solutions Specialist will work with you to look at your current recruitment processes and requirements. Based on this investigation we will produce an initial proposal underpinned by Eploy Recruitment Software. During this phase we will also identify any gaps between our standard solutions and your processes - some of these areas may require more in-depth investigation as the project progresses. Based on our previous experience in working with thousands of recruiters, we aim to provide you with a project cost estimate.

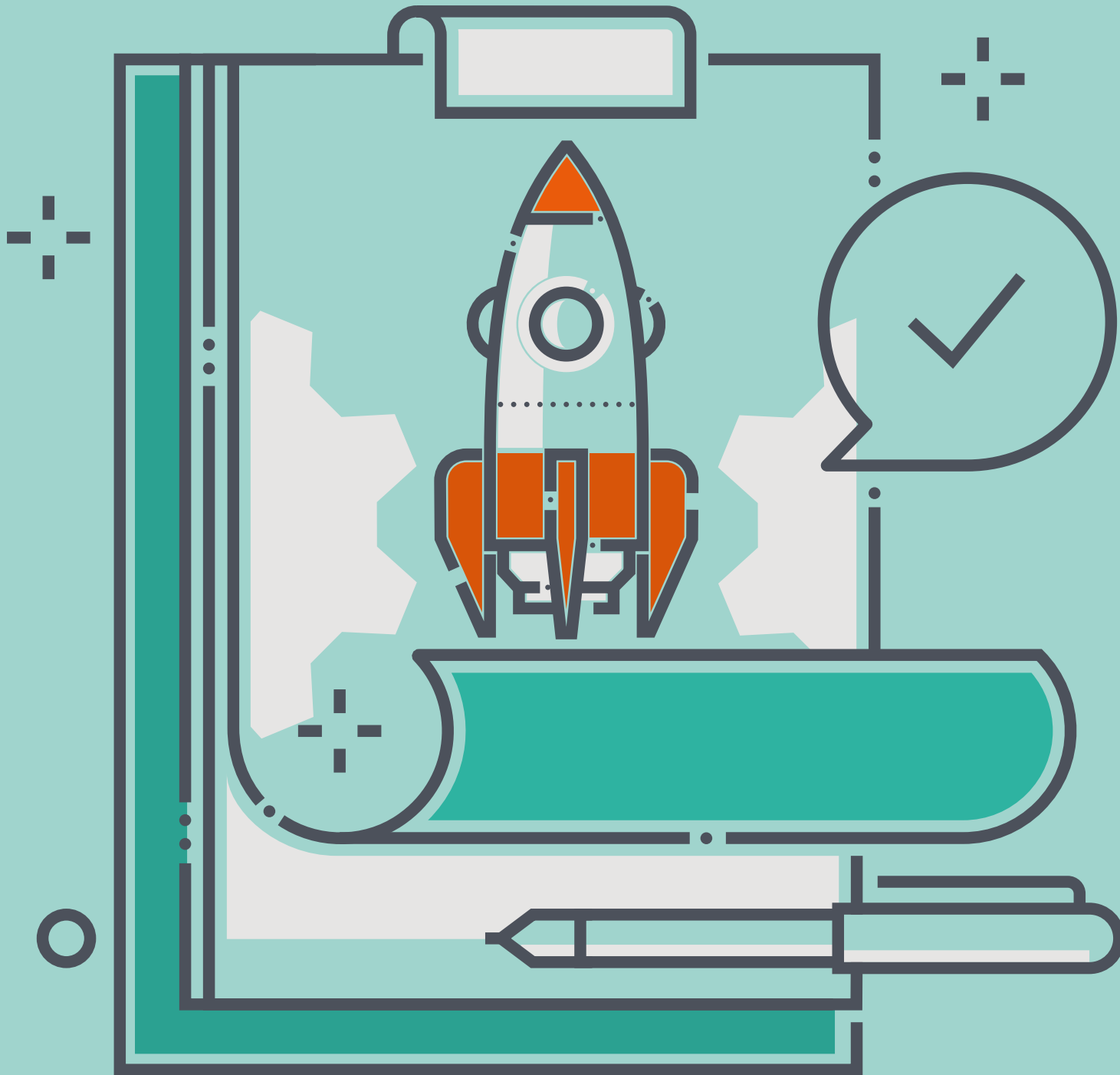
Provided the estimate falls within your budgetary expectations, we will then work with you to build a deeper understanding of your requirements. We call this phase 'Scoping', and at this point, we will introduce you to our Implementation Services team who will drill-down into your processes to scope your requirements in detail.

## Scoping

The first step in this stage is a proposal review between you, your Eploy Solutions Specialist and an Eploy Implementation Manager. At this point we drill further into your requirements to identify and scope the most appropriate Eploy solutions.

Where your processes and requirements necessitate configuration of standard Eploy software, your Eploy team will set out how this can be achieved or, if suitable, how you can tailor your business processes to match Eploy's standard functionality.

Once we have analysed and investigated your requirements fully we will be in a position to provide you with a refined proposal. At this point we hope you will be in a position to select Eploy as your recruitment technology partner.



# CUSTOMER READINESS

“ It's not just about the software, the Eploy implementation team really understand recruitment. We worked closely with our Eploy Implementation Manager who really listened to us and helped us to re-evaluate our processes to ensure we would get the maximum benefit from Eploy. ”

Emma Chorlton  
PBA

@eploy



# Phase 1: CUSTOMER READINESS

FLIGHT TIME  
**3**  
weeks (approx)



At the outset of the project we work closely with you to help you prepare, we call this 'Customer Readiness'.

Our training team will deliver your "Getting Started with Eploy" webinar. This will guide you through the standard Eploy product so that your team will get an excellent feel for what it is capable of and spark ideas for your implementation. We'll share expertise and start to get under the covers of your recruitment processes.

During this stage we will carry out a specification review with you. We also provide you with the Customer Readiness Phase 1 Overview Guide to help you organise all of your requirements and specifications.

## Highlights

The key aims of the Customer Readiness phase are:

- Welcoming your team to Eploy - the technologies and people that will work with you to achieve your recruitment goals.
- For you to understand how Eploy 'works' so that you can make informed decisions about how you want your future processes to be embedded into the system.
- Gathering your requirements and providing them to your Eploy Implementation Manager.

## Guides & supporting resources

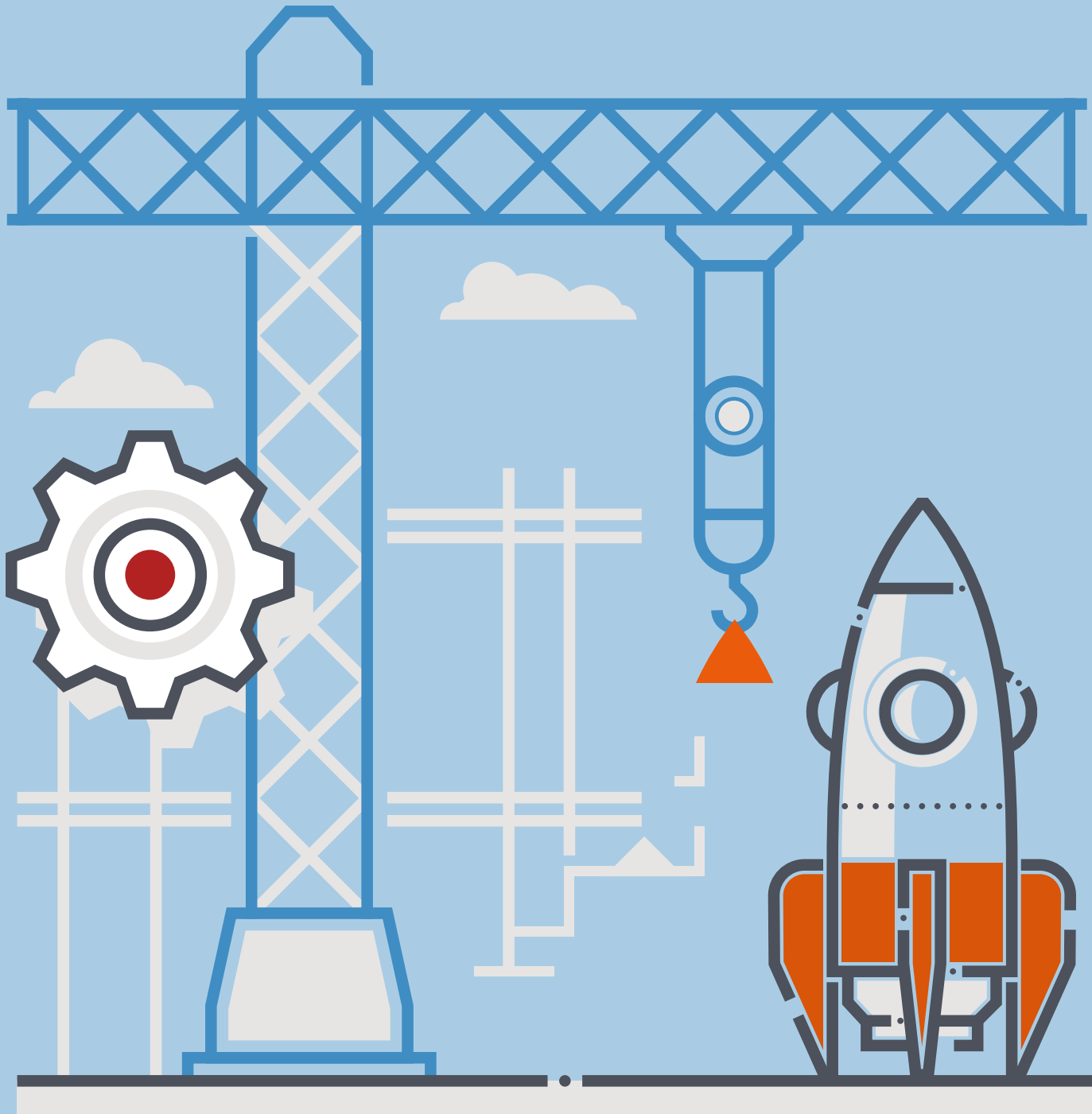
We'll provide you with a series of documents and guides that collate and clarify how we will run the project together. The pack includes:

- Phase 1 Overview Guide
- Access to Online Help Guides
- Project Plan & Task List (via Teamwork)
- Specification Documents (vacancy requisition & authorisation, candidate registration & application, recruitment workflow, offer details and authorisation, onboarding etc)
- Access to an Eploy Demo System

## LEARN MORE:

Download the Phase 1 Overview Guide here:





# EPLOY BUILD & CONFIGURATION

“ In implementing Eploy, we have saved time across the Group in our recruiting processes. Not having to rely on CV's coming into an individual's inbox is a huge step forward ”

Ben Gabbitas  
Head of Recruitment  
Malmaison



## Phase 2: EPLOY BUILD & CONFIGURATION

FLIGHT TIME  
**3-6**  
weeks\*



Next, we move into the Eploy Build and Configuration phase. Here, your Eploy Implementation Manager will take all of the knowledge gained in the readiness phase and hand this over to our team of Implementation Engineers to configure your Eploy System to meet your requirements.

During this stage, the key milestone will be the Build Delivery Day, which depending on your preference will be an onsite or remote meeting where we'll walk you through your Eploy system so you can see how it has been built based on your specification.

### Highlights

The key aims of the Eploy Build & Configuration phase are:

- For the Eploy Implementation Team to build your Eploy system based on the specifications provided in the Customer Readiness phase.
- The Build Delivery Day
- For you to get prepared for the next phase (Customer Configuration). We'll provide 2 x 2.5 hour Customer Configuration training sessions to help you understand how to customise parts of the system.

### Guides & supporting resources

During this phase, we will provide you with the Phase 2 Overview Guide, access to online help guides on how to prepare for the next phase, Customer Configuration, so you can prepare for the following tasks:

- Vacancy Templates
- Authorisation workflows
- Application & Onboarding forms
- Recruitment Workflows
- Email & iCal templates
- Document Templates
- Job Alert settings
- Reference Collection settings
- Drop-down lists
- GDPR module, password & security settings

### LEARN MORE:

Download the Phase 2 Overview Guide here:





# CUSTOMER CONFIGURATION

“ Unlike other vendors that had a model where the framework was rigid, Eploy could support our requirements and were flexible to our tight timescales that were dependent on the Milkround cycle and vital to engage with university students, and graduates. We had a smooth implementation of the core Eploy recruitment platform in just six weeks. ”

Melissa Edmondson  
Recruitment Manager  
OC&C Strategy Consultants



# Phase 3: CUSTOMER CONFIGURATION

FLIGHT TIME  
**3**  
weeks



The third stage is the Customer Configuration phase. Now you will start to take ownership of your system and use Eploy's many configuration and personalisation features to make the system your own.

You'll set up your templates for vacancies, emails, and SMS – but we don't leave you entirely to your own devices. Your Eploy Implementation Manager is always on hand to guide you through the process and get you ready for customer testing.

During this phase we'll also give you a full 'Solution Playback' an end to end walkthrough of your configured and built Eploy system.

## Highlights

The key aims of the Customer Configuration phase are:

- For you to configure all of the parts of Eploy that you have prepared for during the previous phase, to add your personalisation to the system.
- To prepare for the Customer Testing phase.
- For you to attend the 3 hour Customer Testing training session to help you understand your training approach and take advantage of Eploy's templates and online help guides.

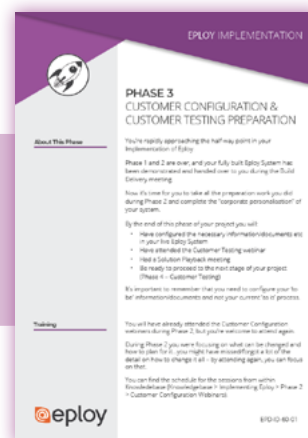
## Guides & supporting resources

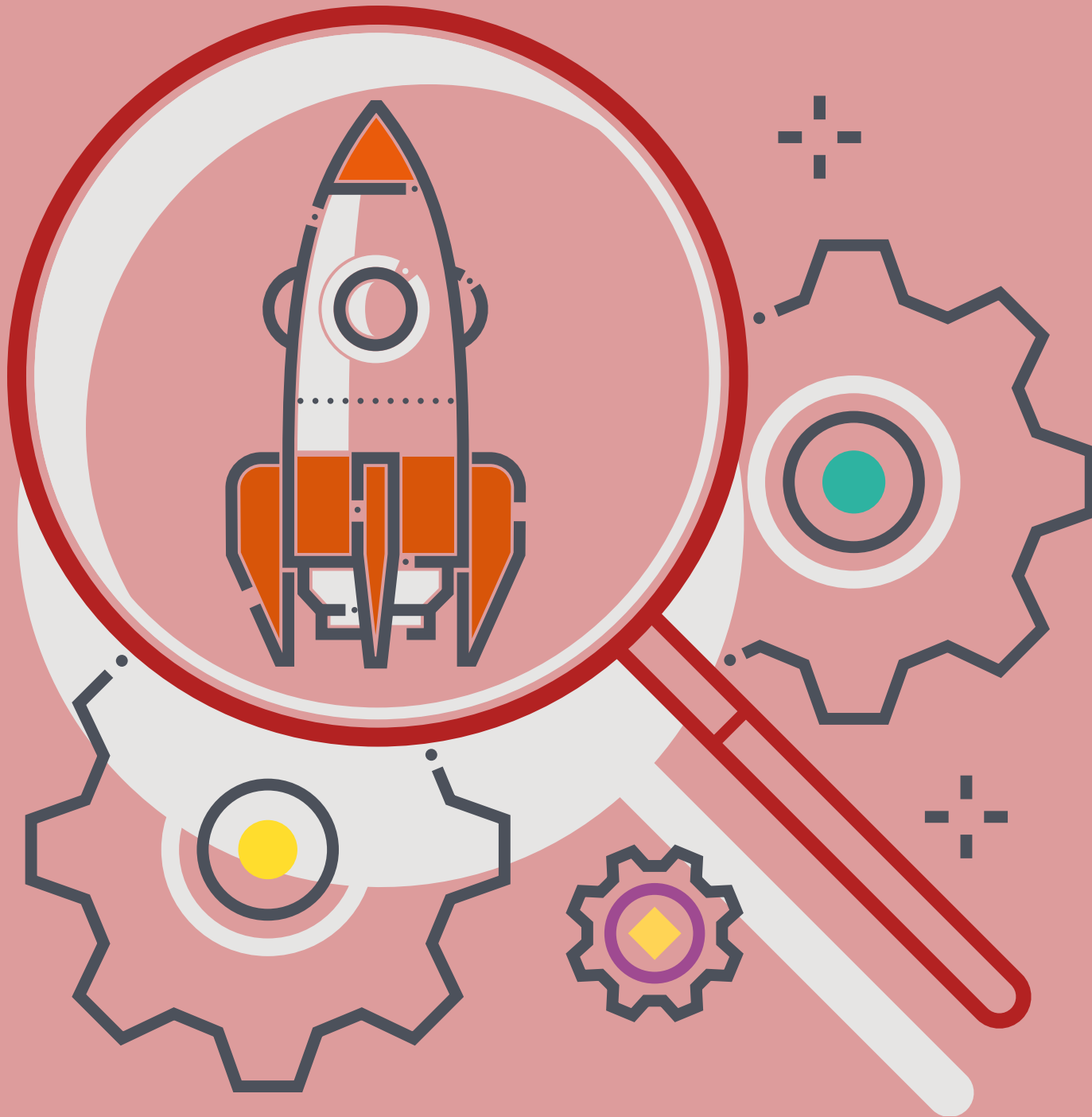
During this phase, we will provide you with the Phase 3 Overview Guide and give you access to online help guides on how to configure your system so you can customise:

- Vacancy Templates
- Authorisation workflows
- Application & Onboarding forms
- Recruitment Workflows
- Email & iCal templates
- Document Templates
- Job Alert settings
- Reference Collection settings
- Drop-down lists
- GDPR module, password & security settings

## LEARN MORE:

Download the Phase 3 Overview Guide here:





# CUSTOMER TESTING

“ Having an open channel with Eploy worked really well for the design implementation process as did having named, direct points of contact. We found the Eploy structured approach, documentation and workshops were very helpful to us throughout the process. ”

Natalie Coles, Project Manager  
Transformation & Efficiency Team  
South Gloucestershire Council

## Phase 4: CUSTOMER TESTING

FLIGHT TIME

3

weeks



With your system built, configured and personalised to your way of working, we'll then enter the Customer Testing phase. At this point, you'll be able to put your Eploy System through its paces, run some real-world scenarios and together we'll be able to make any changes, tweaks and flourishes to ensure the system is fully aligned to your business.

### Highlights

The key aims of the Customer Testing phase are to:

- Agree your testing plan, including identifying who will take part in the testing.
- Prepare your test scenarios and collate your test scripts.
- Test that the system functionality matches the agreed specification documents.
- Update the testing and feedback logs.
- Re-test any items re-worked by your Eploy implementation team following your feedback.
- Sign off the system so that we can make it 'live'.

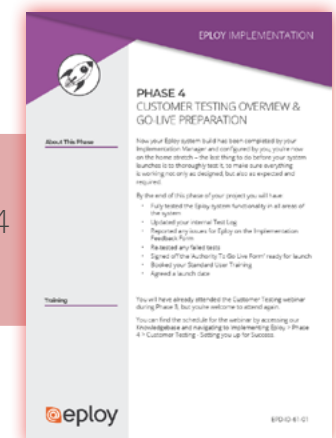
### Guides & supporting resources

During this phase, we will provide you with a Phase 4 Overview Guide, access to online help guides on how to go about testing your full end to end recruitment process, from raising a vacancy in the Hiring Manager Portal to signing a contract as a candidate and everything in between. We will also provide you with the following supporting documentation:

- Testing log template
- Example testing scenarios
- Testing script template
- Feedback form template to gather feedback for your Implementation Manager

### LEARN MORE:

Download the Phase 4 Overview Guide here:







# LAUNCH & HYPERCARE

“ As a qualified remote and classroom trainer Trainer I can say with confidence that Glenn's delivery was first class. His product knowledge was perfect, his style was first class, as was his pace and the delivery process over all was superb.

”

Andy Butterworth  
Ipsos MORI

## Phase 5: LAUNCH & HYPERCARE

FLIGHT TIME

3

weeks



Finally (and most excitingly!), we move into the Customer Launch and Hypercare phase, this is where we launch your Eploy System to the world, but again, we are by your side to hold your hand.

At this critical point in the project. We aim to get all of your users, hiring managers, and broader community fully enthused with the system to realise the benefits they are seeking. We'll also be training your new users

across the relevant aspects, features and portals of the system so that they are confident and ready-to-go when we launch.

In the unlikely event of something being missed – we are there to make any final system amendments and provide any additional training or refreshers as required.

### Highlights

The key aims of the Launch & Hypercare phase are to:

- Add your live vacancies.
- Make sure all of your Eploy system users are comfortable with processes and how they will use the system in their day-to-day roles.
- Launch your system out to the external world.
- Provide you with a Floorwalking Session, where we will spend time with you and your team to ensure everything is running smoothly.
- Assign you with a dedicated Account Manager.

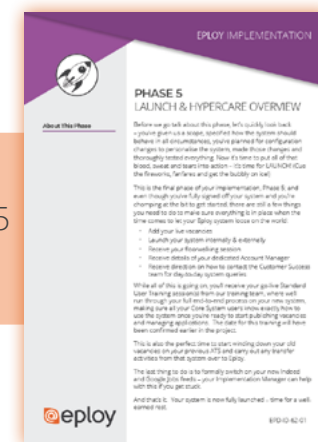
### Guides & supporting resources

During this phase, we will provide you with the Phase 5 Overview Guide with lots of useful information around this final phase of your project. You also have access to Introduction to Dashboards and Reports online training session.

During Hypercare, your Eploy Implementation Manager will continue to be your main point of contact at Eploy.

#### LEARN MORE:

Download the Phase 5 Overview Guide here:



Eploy Implementation Methodology



# OUR CONTINUAL PARTNERSHIP



## CUSTOMER SUCCESS TEAM

Our Customer Success team are always on hand to help you get the very best from your Eploy system.



## ACCOUNT MANAGEMENT TEAM

Your Eploy Account Manager is always available to schedule regular calls and update you on new Eploy technologies.



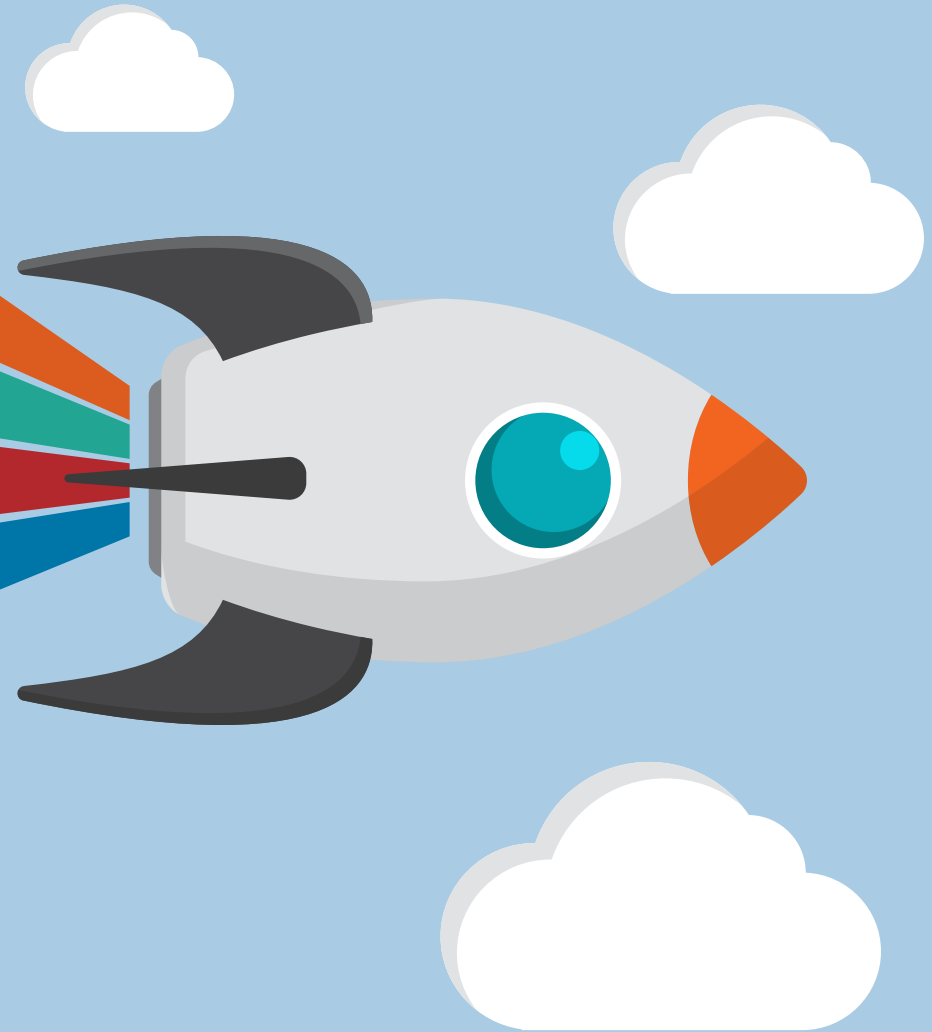
## 6 MONTHLY ACCOUNT REVIEWS

Your Account Manager will schedule a face-to-face meeting every six months as well as regular catch-up calls in between.



## KNOWLEDGE BASE

The Eploy Knowledge Base is crammed with help, tips and video tutorials and can be accessed via your Eploy System.



# Beyond Launch: CONTINUAL PARTNERSHIP



Your journey with Team Eploy does not end at the point at which you go live. In many respects, it has only just begun.

We continue to support you both online and in-person. Our Customer Success team are on hand to ensure you are getting the very best out of your investment in Eploy, and our Account Management team will keep you up to date with all of our latest developments.

## Eploy's Customer Success Team

Our Customer Success team are highly trained Eploy Experts. The team has a wealth of prior experience working within recruitment but have successfully made the transition to working within a dynamic software business.

Put simply, they understand recruitment, understand Eploy and will understand your objectives.

You can contact the team by phone and email, and they will handle all of your service requests directly via our online ticketing system, ensuring you are always kept 'in the loop'.

## Eploy Knowledge Base

The Eploy Knowledge Base is our online platform for user help, video tutorials, support documents, and raising service request tickets. You and your team can

access the Knowledge Base directly from within your Eploy system.

## Eploy Account Management

Once you have successfully gone live, we will introduce you to your Eploy Account Manager. Your Account Manager is responsible for ensuring the smooth running of your account.

Your Account Manager will handle any account queries or requests and will keep you up to date with the latest news and technical innovations as soon as we introduce them.

As well as being available via phone and email, your Account Manager will arrange a face-to-face account review with you at least once every six months. For this meeting, your Account Manager will prepare a detailed presentation which includes system and website statistics (including insights from Google Analytics) and support tickets (volume, categories and satisfaction). It's an excellent opportunity for us both to learn more about each other and build a great working relationship together.

## Eploy Training

Our dedicated Training Team provide online, classroom and on-site training in all aspects of Eploy. Training is a continual part of the process and is particularly useful when you have new team members or when you introduce new Eploy features.

## Upgrade Release Management

When we upgrade your version of Eploy we work with you to agree a time and date for the upgrade to give enough time for you to make any preparations if necessary. Typically upgrades are performed in the window of 4am to 7am unless otherwise agreed with you first.

Eploy creates detailed release notes for each Eploy System Upgrade, in addition, new training materials for new features are created and added to the online Eploy support centre. Release notes are distributed via email, via the support centre and also within the product itself following a system upgrade.

Prior to a system upgrade, we will create a secure test environment, completely segregated from your live environment. This will enable you to conduct User Acceptance testing prior to rolling out the upgrade to the live environment.

## Configuration Management

Eploy is a highly configurable system, so there are a vast number of modules and processes that can be configured directly in the system by you and also by Eploy.

Of course, you can always contact our Customer Success team who are there to help with any configuration changes that you may wish to make to your Eploy System.

# Beyond Launch: CONTINUAL PARTNERSHIP



## Change Management

We appreciate that even in the most thoroughly scoped and specified projects, change requests will inevitably arise for several reasons. Whilst we can manage change requests by 'exception' rather than by rule, we understand that this is a normal part of implementing software and a vital element of an agile and flexible approach to our work with you.

### Changes to requirements and configuration during implementation

Each request will be assessed by your Implementation Manager, with the support of the Head of Implementation Services if necessary. Each request will be discussed with your assigned project lead and triaged by your Implementation Manager to understand the impact of the change. The Implementation Manager will carry out a risk assessment to other project activities.

We will then work with you to identify a solution to the change request. For minor changes, these are usually managed as low-level activities and not recorded with change control, providing they are sufficiently documented and agreed through the Implementation Feedback Form or project action log. Where change control is required, and following triage and a mutually agreed solution confirmed, your Implementation Manager will provide you with a change control form to review, sign and return to us.

The change control form will include an agreement of any additional costs to be paid, e.g. costs of any additional development.

### Changes to requirements post-implementation (in BAU)

Once your project is live and you are in 'Business As Usual' (BAU) your dedicated Account Manager will manage any changes to your requirements such as adding products or services. This type of change will require a Service Order Form, which will detail the addition/ change along with the associated cost. Examples of such changes may include extending the roll-out of your Eploy system, new website designs, bespoke integrations or should you require consultancy services from our professional services team.

## Business Continuity

Eploy reviews, tests and updates our business continuity and disaster recovery plans at least annually, or when there is a new threat or change to operations. Please also refer to ESEC-BC-01 Eploy Business Continuity Plan, which provides details of RPO and RTO.

## Capacity Management

We have automated monitoring on our systems that report on page speed as well as identify performance bottlenecks such as slow queries. This allows us to continually monitor and improve performance of the Eploy platform. We also regularly upgrade our infrastructure and conduct stress tests on our systems to ensure they can handle high volumes.

Eploy is audited by Netcraft on a rolling quarterly basis. This involves Netcraft testing our internet infrastructure and supplies us with the information we need to maintain your security and eliminate vulnerabilities. The service provides Eploy with a dynamically generated seal which audits that no serious vulnerabilities were found. This gives our users and customers the confidence that we are proactive about security, and the assurance that our services are scanned regularly.

## Information Security

At Eploy, Information Security for our business and our customer's data is at the heart of everything we do. We have implemented a comprehensive Information Security policy and governance framework which has been certified to the IASME Governance Standard and Cyber Essentials Plus.



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Faster, Smarter  
Recruitment Software