The recruiters guide to
ATS Data Migrations

by Crelate™ Talent

Contents

Data Migrations Don't have to be Painful

Data migrations are often viewed by business professionals as a major obstacle that is simply too difficult and too costly to take on. One of the most common reasons people give for not wanting to move Applicant Tracking Solution (ATS) providers is the fear of a difficult data migration. It's unfortunate, but recruiters are often willing to suffer and pay for antiquated products that they know aren't helping them do their job and be successful. Instead, the inferior solutions are viewed as "good enough for now'" given the perceived risk of a move. Vendors should strive to take the fear and risk out of a data migration, so busy recruiter teams are free to evaluate the merits of a system move on benefits and not just risk. The decision to upgrade your ATS should be based on the functionality, productivity gains, and the long-term value they will provide. This guide will provide you all the information needed to successfully assess and predict how a data migration is likely to go once an ATS solution is chosen.

To be frank, the actual migration of data isn't really that hard. Yet it's incredibly common to hear time and time again, "So and so completely screwed up my last migration" or "A friend of mine did a migration and it was a total mess." Why is this? In our experience, it is rarely a pure technical problem, but instead comes down to the parties involved. Data migrations are simply more successful when both the customer and the vendor are flexible, reasonable and strive for a shared goal.

For the vendor, having the technical chops is a must, but they need to pair that with a flexible and consultative approach to the migration. They must be reasonable, transparent and mentoring in their approach. The best vendors will have a genuine invested interest in the shared goal of a successful migration, with an eye on the long term customer relationship.

For the customer, there is a need to be flexible as well. Every system is different and allowing your data and processes to transform and adapt is crucial. They must respectfully understand that migrations are not free, they take time to do right and there are real costs associated with that time. When it comes to migrating systems, almost anything is possible, but the costs can quickly rise and the additional benefits can fall just as quickly.

The process of moving data from one system to another is as old as computers themselves. There is a well-established pattern for doing so, known as ETL. Extract (getting the data out of your old system), transform (converting / mapping it to the new system) and load (getting it into the new system). While the process may seem like a challenge, experienced IT consultants do successful migrations every day. Once the migration is complete recruiting professionals can get back to the business of aligning the right talent, with the right opportunity, at the right time.

To begin your journey of changing recruiting solutions, here are 7 important things to consider when planning and preparing for the migration.

1 A Few Questions to Start with when Selecting a Vendor

As you are qualifying and researching potential ATS vendors it's important to assess their data migration process and get answers to several key questions.

A few key things to ask include:

- How many data migrations has the vendor successfully completed?

- Does the vendor have a long track record of successful data migrations from a variety of data sources with different formats?

- Has the vendor had any failed migrations? How were they handled and what was the reason?

- Does the vendor have a standard template already in place for ATS vendors in the market? If so, is your vendor one that has a template ready to go?

- How long will the entire process take? Typically, data migrations happen in 3 phases – (1) Discovery & data clean up, (2) Doing a test migration for review, and (3) Final data migration & going Live. You will want estimates on timelines for each aspect of the process.

2 Great Time to Assess Current Business Processes

When it's time to upgrade your ATS and do a data migration this is also a wonderful opportunity to review business processes — and potentially cut the clutter in current protocols. One question that should be asked is: What do we use our current data for? Perhaps there are data fields, or records in your database that are not being used and no longer fit your current day-to-day processes. Or perhaps you are limiting yourself, based on practices a previous system forced you into - a new system is a great time to be open to new ways of doing things. The more you can 'clean up the data' and provide a simpler data set, the smoother the data migration will be. If your data has gone through several migrations over the years, it can degrade into a mess.

Vendors may offer data clean up services, but this can get rather spendy if your database is unorganized or even, perhaps, unruly (meaning there is a percentage of the data that simply isn't helping you meet your current business goals). Best practices are to do as much clean up as you can on your end. What's more, as you take a big-picture view of your business processes you can find ways to cut current operations that are leading to extra work.

3 Get a Fresh Start

After you have assessed business processes, and determined what data and processes need to be kept and what can be discarded, then the data cleanup can begin. Recruiters' databases can get rather large of course, but if you haven't touched a candidate since the late 1980s perhaps this is data that you can let go of. There are serious downsides to the cumulative effects of keeping old data that isn't useful. At best it can slow you down, at worst it can prevent you from finding what does matter through all the noise. It might be important to know you talked to a candidate 20 years ago, but do you really need every correspondence or their 20 year old resume? A common strategy for dealing with extraneous data, is to come up with a cutoff date and then clean up the data accordingly. For instance, you might decide that if you haven't had any contact with a candidate for 10 years the data won't be saved to your new ATS instance. Suffice to say the more you keep that isn't terribly productive the more time a data migration consultant will have to spend during the migration, which could lead to more costs and a longer time frame for completing the conversion.

4 Be flexible - Data Mapping, Losing Data, and Data Fidelity

Given the fact that there are so many ATS options and each one has their own strengths and weaknesses, the data mapping step becomes paramount for ensuring that a migration is successful. Look for a vendor that uses a consultative approach to data migrations. Working with you to understand your processes and what's important moving forward. They should be able to make recommendations and suggestions on how your data can map and fit into the new system.

Be prepared for some give and take however; every system is a bit different (regarding things like tagging, fields, sub-entities, and so on), it can be a lot like trying to fit a square peg in a round hole. The more reasonable and flexible the parties are, the more successful your migration will be. It is critical to weigh the costs and benefits of losing or gaining fidelity in our new ATS solution via the data migration process.

Beware of too much "Yes". Remember that no two systems are alike, and some things will not map in the same manner as they were in your old system. If your migration consultant is simply mapping everything over 1:1, chances are that you are not going to be utilizing all of the things that you chose your new system for. Some ATS data models were designed more than two decades ago and aren't up to speed with advances in social media, job boards, portals, and so on. Simply put, to get the most out of your new system, the need to actually transform your data may be critically important.

Unfortunately data transformation services are not always an option from some ATS vendors or can be cost prohibitive to use. Consider if a vendors "one-size fits all approach" will work for your business. This is yet another reason why having a dedicated data migration consultant working with you is ideal. As the process is happening it's great if you have someone that can assist from start to finish.

5 Minimizing Downtime

Recruiters looking to move to a new ATS should expect between 2 to 4 weeks for the entry data migration process to be completed (from the initial discovery to the 'go live'). The time it can take hinges on how complex the migration is, how much data cleanup / mapping is required and the responsiveness of all parties involved. The last point is critical. Customers need to be responsive in providing feedback and acceptance. Delays in getting data from your previous vendor can be significant. You should expect to need at least two exports; one for the initial mapping and a second for the final cut over.

Be sure to ask when your migration project can actually start. Your new vendors may have a backlog of migrations, so the 2-4 week process may not even start for a while. Finally, ask how long the actual migration run will take and if it can be scheduled and completed overnight or over a weekend to minimize impact to your business.

6 Managing Parallel Systems

Foresight and planning is critical, if your recruiting agency plans for the switch to a new ATS then the best-case and lowest overall cost and risk scenario is if the downtime window is limited to a single night or a weekend period. Unfortunately, this isn't always feasible. A frequent cause of which being the time it takes to get the final copy of your data from the previous vendor and the speed at which the data can be actually loaded into the new system.

If minimal downtime is the priority and you plan on continuing work during the migration, be prepared for the cost and complexity of your migration to rise exponentially. This is because this approach effectively requires two distinct migrations. The first is the baseline set of data (easy), the second is a subset of changes and new data added since the baseline snapshot (a lot harder).

Mature vendors can offer both, however the later will typically be treated as a custom migration and may be priced multiple times as much as the single migration approach.

7 Costs of Data Migrations for ATS Market

There is a fairly wide-range of costs when doing a data migration. Of course, the key factor is how much data is being migrated and how much effort is involved. Enterprise systems can have migrations that can cost upwards of $25K. For smaller recruiting teams the cost typically ranges from $500 - $5000. The reality is it takes time and costs money to get a data migration done right, so be wary of "to good to be true" offers. Some vendors price migrations at cost, then offset the true cost by factoring in the total deal value or have internally become very efficient at it. All approaches can result in a quality migration at a lower price. Other vendors may force a one-size-fits-all approach to lower initial cost, and the price may rise quickly when you venture beyond the template. Finally, while not inherently bad, some vendors see migration services as an actual profit center and will price migrations simply at market rates. No one approach is best, but an informed buyer should be find an approach they are most comfortable with.

Beyond the actual migration costs, be sure to consider other costs, such as training your team on the new system. If your old ATS provided your candidate portal, that too, along with any other back-end integrations will need to be moved over and there will be costs to consider.

Data Migration Processes Circle Back to "Fit"

Just like when you are trying to find the candidate that aligns the best candidate, with the right opportunity, at the right time—when thinking about making the move to a new ATS, one very important factor is the overall fit. Consider how the new solution and vendor fit with not just your processes, policies and functional needs, but your company culture as well. To help, when you are evaluating ATS vendors, you should be sure to ask a lot of questions about the vendor's approach and practices around data migrations. The data migration process can serve as an initial indication of how responsive your new ATS vendor will be overall. What's more, if the ATS provider does a high-quality data migration this usually provides an accurate preview of how the support will be once you are up-and-running.

About Crelate™ Talent

This recruiters guide to data migrations is provided by Crelate. Crelate offers modern, flexible and full-featured recruiting solutions for talent focus businesses. The Crelate team has performed 1000's of successful migrations collectively. Crelate's is committed to helping its' customers align the right talent with the right opportunity at the right time.

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