ATS RFP Template

The following template is intended as a starting point for a project leader developing an RFP for an ATS. The leader can add, remove or change sections to meet their company's needs.

Each section of the RFP is listed below, with a brief description of what should be included.

Cover page

The cover page contains basic data about the company and the document's author. Include the following information:

- Project name.
- Company name.
- Version number.
- Date of the current version.
- Author's name.
- Author's contact information (optional).

Table of contents

The table of contents can help the reader navigate the document. Before finalizing a version of the document, make sure to update the table of contents if needed so it matches the document's contents.

Change log

The change log is a simple table that tells readers the timing of the last RFP update, who updated it and the changes made. The change log only needs to be updated when a new version of the document is posted or shared with others. However, it's important to keep track of changes between versions.

Include the following items at a minimum:

- Version number.
- Date of the current version.
- Who made the change(s).
- Summary of change(s).

Project overview

The project overview explains why the project was initiated and provides a high-level overview of the timelines and key requirements. The overview can also include some of the challenges that the talent acquisition team is currently experiencing and key features that the team is looking for in a new system.

Data such as the company size and regions or countries where the company operates could also be included.

Primary contact information

The primary contact is the person that vendors will be required to contact if they have questions. This section should include the primary contact's email address and phone number.

The section may also include a backup if the primary contact will be away for an extended period. The document may also include an expected response time, such as 48 hours or 72 hours.

Company overview

The company overview helps vendors understand the makeup of the company and helps vendors understand whether their software is a good fit for the needs of the company.

The following information will be helpful to include:

- Company name.
- Subsidiaries and whether they will use the ATS or not.
- Countries in which the company operates and whether all company locations will use the ATS or not.
- Number of employees by region and overall number of employees.
- Specific states and provinces where the company operates.
- Link to a company website.
- Any significant event that may affect the project, such as a recent acquisition.
- Whether employees are unionized or not.

Project timeline

This section indicates the date the company plans to finalize a contract, the date the company plans to implement the software, and most importantly, the expected go-live date.

This section can also include blackout dates when the go-live cannot happen or dates when work on the project will be impacted, such as holidays, major company events or other project go-live dates.

Software requirements

The software requirements is one of the most important sections of the RFP. This section is the talent acquisition leader's opportunity to make sure that all the company's needs as they relate to an ATS and all of the talent acquisition team's requirements are documented so vendors know what their application needs to provide. This section can also help the evaluation team know what is expected of the new ATS.

The requirements should be numbered, with a title and a description. The document might also prioritize each requirement and indicate the scale that will be used to evaluate each requirement, such as a three- or five-point scale.

Here are some important feature areas to consider:

- Features that simplify and improve the ease of use for the talent acquisition team.
- Interfaces, such as an interface to the company's HRIS and systems that carry out background checks.
- Onboarding functionality or an interface to the system used for onboarding.

- AI functionality to help summarize and rate candidates, help with writing communications, and identify past applicants in the ATS database for new opportunities.
- Workflows for approvals related to new requisitions and offers.
- Functionality related to the candidate experience.
- Features to help reconcile new requisitions to budgets and the needs of the finance team.
- Data storage and incorporation of features related to data privacy laws.
- Data and application security, such as SOC2 compliance.
- Single-sign-on and/or username and password functionality for employees and candidates.
- Digital signatures for the talent acquisition team, hiring manager and candidate to sign offers.
- Reporting and dashboards.

Project budget

The project budget section is intended to give vendors a general idea of the amount that the company intends to spend on a new system.

Smaller budgets might lead large vendors to avoid submitting an RFP because it doesn't meet a minimum threshold. The goal is to set a realistic, high-level budget, which will help attract the right vendors for the company's size and needs.

RFP process and deadlines

This section outlines the rules that vendors must follow and the deadlines they must hit. For example, this section could include an explanation of how vendors should submit questions and to whom; how information is shared with interested vendors; the information that a vendor submission must include; and the required document formats.

Also included here is information about the overall process and potentially requesting additional feedback from the vendors who are participating and notifying vendors of the need for one or more demos.

This section can also include information about the negotiation process.

Evaluation plan

This section includes information like the way that points will be awarded to each section of the submissions and the names of each section so vendors can make sure they include all sections in their submission.