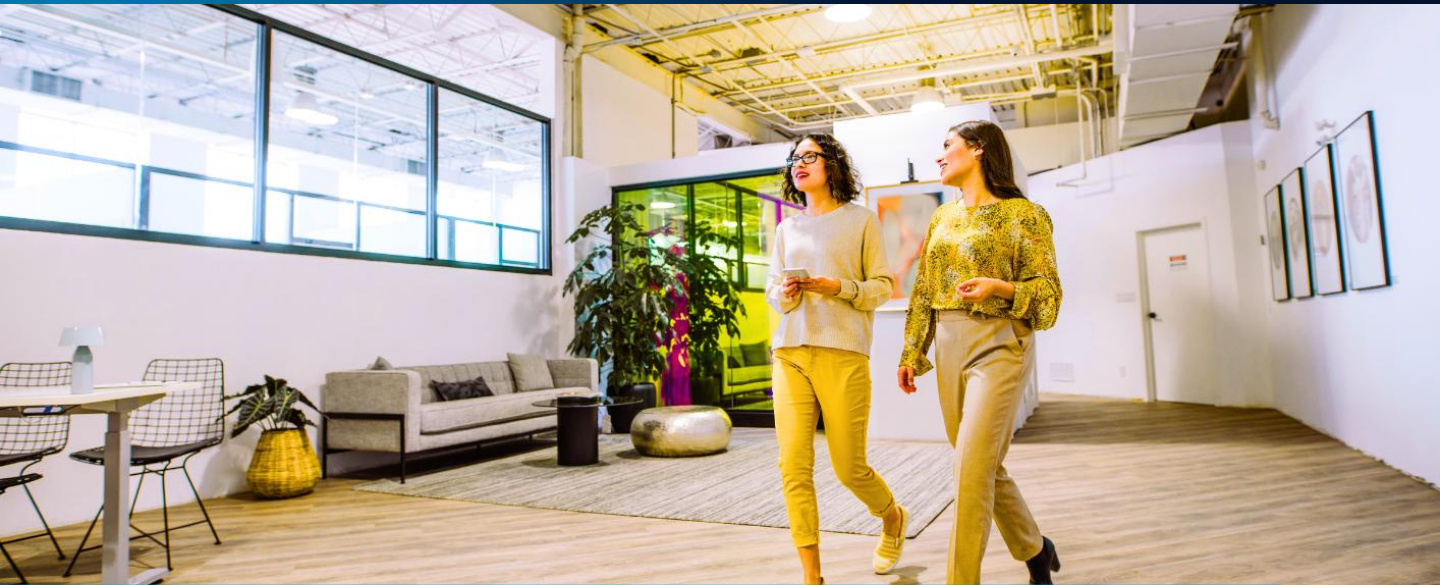




BUSINESS CASE PLAYBOOK:

**Securing investment for an
Applicant Tracking System**

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Executive summary

- A modern Applicant Tracking System (ATS) can typically cut time-to-hire by at least 40%, reduce agency reliance and surface invaluable real-time insights and analytics.
- This playbook sets out a practical action plan that starts with benchmarking current recruitment performance and ends with an implementation roadmap. It details how to gather the right data, unite stakeholders, compare solution options and build a compelling ROI narrative - giving you the clarity and evidence needed to win funding with confidence.
- Detailed templates, evidence and calculation worksheets are included in the appendices to help you adapt the case for your trust.

Introduction

This guide is designed to support HR, Resourcing and HR leaders to build a compelling, strategic business case for implementing Jobtrain as a new applicant tracking system (ATS).

The guide outlines step-by-step actions, stakeholder engagement strategies, template content and justifications to help you gain executive approval and, critically, budget.

1. Why a new recruitment system?

Organisations are under increasing pressure to improve recruitment outcomes, but they're facing significant challenges and barriers including:

- Staff shortages and agency dependency
- Time-to-hire bottlenecks
- Outdated technology
- Inaccessible candidate journeys
- Fragmented data and time-consuming manual reporting



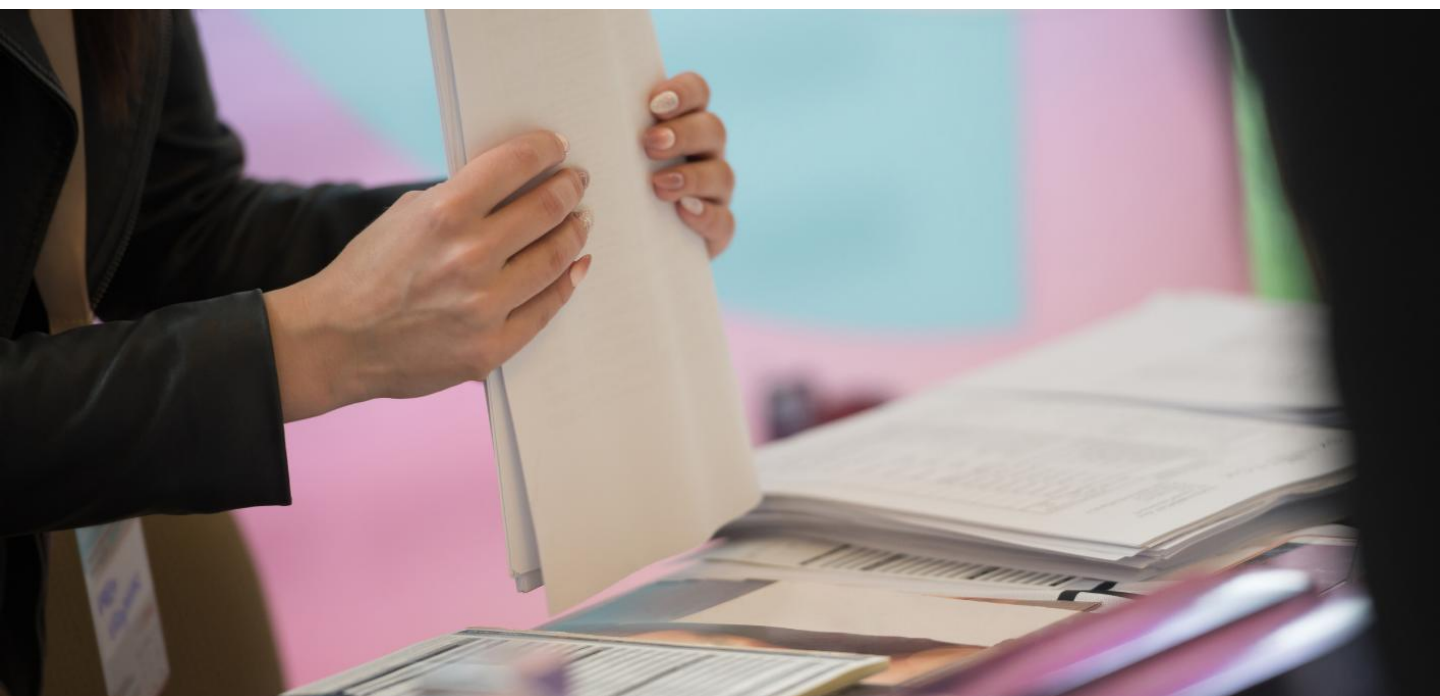
2. Getting started:

Planning the business case

To create a compelling business, it's critical to gather as much data and evidence as possible. The following list is not exhaustive but covers many of the most important information and background you'll need for your exec team.

When preparing your business case, consider not only the functional benefits for HR but also the broader organisational impact. Strategic return on investment (ROI) may include:

- ✓ Reducing the cost of unfilled roles by enabling faster hiring
- ✓ Enhancing candidate experience and improving brand perception
- ✓ Enabling greater diversity through wider reach and inclusive application processes
- ✓ Strengthening onboarding processes, leading to reduced time to hire, increased productivity and reduced attrition
- ✓ Empowering the organisation with actionable data and transparency robust reporting tools



What to prepare:

- Time-to-hire and cost-per-hire data (last 12–24 months)
- Time taken stage by stage (e.g. interview arrangement, hiring manager shortlisting, pre-employment checks and onboarding)
- Current ATS or recruitment process management limitations (candidate satisfaction, drop-off rates, reporting issues)
- Vacancy advertising costs and agency spend
- Internal feedback from HR, managers and candidates
- Any systems, outsourced services or tools that could be replaced from implementing Jobtrain as a single solution.

2. Getting started: planning the business case

Consider preparing a table such as the one below, (which is not exhaustive), to show the impact of updating or implementing an ATS.

Criteria	Adopt a modern ATS now
Candidate experience	Mobile, inclusive, self-service, increased conversions and quality
Time-to-hire impact	Up to 40 % faster
Integration with 3rd party services	Open APIs and latest integrations.
Cost profile (3-year total)	Predictable SaaS licence, a single platform for recruitment, automations plus agency and outsourced saving offsets
Reporting and data	Flexible dashboards, advanced reporting, full business intelligence and reporting building and distribution capability.

2. Getting started: planning the business case

Project team and sponsors:

You will no doubt have access to a whole team of talent and skills in Technology, Procurement, HR and Marketing that you can draw on, so involve them early in the project. Their expertise will be invaluable and they'll appreciate being consulted and involved.

If you don't, they could even prove to be blockers just when you least expect it and hamper the progress or even success of the project.

Some examples of these key sponsors include:



Executive Sponsor:

HRD, Chief People Officer



Project Lead:

Resourcing/Recruitment Lead



IT/Digital Partner:

For integration support



Finance Partner:

To validate costings and ROI



ED&I Lead:

For accessibility and compliance metrics



Communications Lead:

For training and engagement strategy

3. Step-by-step: How to build your business case



Define the problem

- Describe the fragmentation of the recruitment systems
- Highlight inconsistent experiences for candidates
- Quantify duplication in costs and inefficiencies



Set the vision

- One platform to manage the entire process and access and improved visibility for all stakeholders
- Autonomy in supporting and improving the process and branding/careers site content
- Centralised reporting and insights



Show strategic alignment with:

- Is there a drive for increased efficiency and automation across the organisation?
- Is there a focus on using data to inform decision making and strategy?



Identify operational benefits

- Streamlined candidate experience and onboarding
- Centralised support, governance and configuration



Financial

- Reduced overall licensing and support costs
- Free job board advertising options and reduced costs for premium job posting
- Lower reliance on recruitment agencies

4. Present the options

**Status quo
(fragmented or
outdated systems)**

OR

**Central platform to
automate and more
efficiently deliver
recruitment across the
organisation**

5. Develop the cost model

- ✓ The ATS annual licence and support fee
- ✓ Cost of implementation
- ✓ Forecasted savings from any outsourced services currently used
- ✓ Anticipated or expected headcount saving from efficiency gains and automation

Additionally, calculate ROI based on:

- ✓ Decreased advertising spend through job board automation
- ✓ Reduced usage of agencies
- ✓ Time saved through workflow automation and self-service tools
- ✓ Lower reliance on manual interventions such as spreadsheets, email comms, and duplicate data entry

6. Prepare an implementation plan

- ✓ Appoint a central person to have overall responsibility for the implementation
- ✓ Ensure your supplier has the relevant expertise and experience and will fully support and manage your implementation
- ✓ Include change management, comms and training

7. Risk and mitigation planning

- Ensure the software is proven to work for varying types of organisations with references and case studies collated
- Ensure the supplier has taken a thorough and robust approach to information security and GDPR
- Look at procuring through recognised frameworks such as G-Cloud
- Ensure that change is planned, communicated and managed positively



8. Build executive approval plan

- Engage stakeholders early in the process
- Present savings, improved outcomes and readiness for future integrations

9. Additional considerations and support tools

Communications and change management:

- Engage early with end-users and hiring managers
- Run pre-implementation workshops or demos
- Develop rollout plans and training sessions
- Appoint champions to drive adoption

Ongoing optimisation:

- Use the ATS vendor's success consultants' included consulting and advisory services
- Regularly review dashboard insights and campaign data
- Share learning across the organisation

Sustainability role (where appropriate):

- Track local hiring impact
- Streamline recruitment for apprenticeships and entry-level roles
- Improve employment outcomes in deprived areas

9. Additional considerations and support tools

Why?

- With tools like free automated job board advertising offered within a modern ATS platform, a job board marketplace to push your jobs to the best performing advertising sources (at discounted rates and bundles), plus social media platforms, you will increase your reach, post jobs automatically without overspend or having to negotiate contracts
- Powerful reporting capability will identify where your money was best spent, meaning you can reduce spend whilst increasing applications
- A careers site candidate portal powered with video and pictures within jobs to increase your authority to influence the best candidates to apply
- Many of the automation tools described below will speed up your time to hire and improve the candidate experience

Combining the above will mean you become less reliant on agencies as your direct recruitment expands and improves, and the need for supply staff to cover gaps thus decreases. Costs will reduce significantly.



*plus
many
more...*

***Just some of the job advertising options
available from within an ATS like Jobtrain.***

Reduced headcount costs. Why? Here are a few reasons:

- All recruitment managed via a single platform, without manual workarounds and spreadsheets
- Semi-automated/fully automated screening and selection tools
- Automated communications (for internal and candidates)
- Automated online approvals
- Automated online self-service interview scheduling
- Automated and/or integrated services (e.g. Right to Work, ID verification and DBS checks, etc)
- Automated reporting on all aspects of hiring

Next, work out...

- How much time and human resource is spent on these activities currently?
- What do they equate to into typical salary costs over the course of a year?
- How does this compare to the costs of the ATS for the year?

Need help calculating some hard figures? No problem, we have financial calculation tools made just for this.

**Use our online
ROI calculator**

Example benefits list

(Taken from a real-life example)

Candidate experience



- Candidates can complete applications seamlessly on any device, reducing barriers to entry
- Automated communications keep candidates informed at every stage of the recruitment process, building trust and reducing drop-offs
- Compliant with accessibility standards (e.g. screen-reader compatibility), ensuring inclusivity for candidates with disabilities
- A dedicated candidate portal allows applicants to track their progress, upload documents and receive personalised support

Manager experience



- A manager portal designed for ease of use, making approvals, candidate tracking and advert management straightforward
- Instant insights into recruitment performance, including job advert success, candidate pipelines and time-to-hire metrics
- Automated administrative tasks in interview scheduling, compliance checks and offer generation are automated, freeing up managers' time
- Managers can generate tailored reports (e.g. diversity outcomes or application-to-hire rates) without relying on HR
- Visibility across the recruitment process enables managers to act quickly and make data-driven decisions

Reporting and analytics 	• Customisable dashboards provide insights into time-to-hire, conversion rates, advert performance and more • Live updates enable proactive decision-making, ensuring bottlenecks are quickly identified and resolved • Tracks key EDI indicators (e.g. application and hire ratios across protected characteristics) • Provides detailed metrics on recruitment channels to optimise advertising spend and improve ROI
Equity, Diversity and Inclusion 	• AI-powered tools ensure job descriptions are free of bias, encouraging applications from underrepresented groups • Automated reporting ensures alignment with diversity and inclusion standards • Tracks and visualises candidate progression at every stage of the recruitment process, enabling targeted interventions
Skills-based hiring and customisation 	• Role-specific application processes and assessments can be customised to align with job requirements • Focuses on competencies, behaviours and organisational values to ensure the right candidates are selected • Incorporates skills testing, competency-based questions and video interviewing for an adaptable recruitment approach • Custom workflows streamline recruitment for apprenticeships, traineeships and high-volume roles

Operational efficiency and automation



- Automates essential checks (e.g. DBS, Right to Work) to reduce delays and errors
- Streamlines offer letters and tracking, reducing administrative burdens on HR teams
- Handles high-volume campaigns efficiently, with tools for screening, shortlisting and managing applications as well as cohort hiring
- Automated workflows free up HR and managers to focus on strategic priorities, reducing recruitment cycle times
- Automatically flags roles that need reposting based on poor performance or low candidate interest

Financial and cost-saving



- Saves £XXX annually by reducing headcount or resource requirements
- Faster time-to-hire minimises operational disruptions and agency spend for unfilled roles

Example case studies and feature comparison after implementing Jobtrain

- **MAN Truck & Bus** - reduced agency fees by 60% (from over £1m to £376k) after implementing Jobtrain; streamlined process and data-led decisions across hiring managers.
- **Bellrock Group** - 75% reduction in recruitment agency spend; centralised recruiting to support rapid growth from 600 to 1,700 employees.
- **Cornerstone Care** - time-to-hire cut from 90 days to under 3 weeks, with reduced drop-off and stronger EVP via branded candidate portal and media-rich adverts.
- **Roke** - saved 35 hours per month of email admin (equivalent to one FTE day/week) via status-driven automation; wider manager adoption and faster throughput.
- **Active Care Group** - onboarding & compliance cycle reduced to as fast as 24 hours; offer process down to ~2 minutes with manager self-service; 10-week implementation of end-to-end recruitment + onboarding.
- **NHS Scotland / NHS Greater Glasgow & Clyde** - at national level saw 250% increase in applications with 31% faster time-to-hire (nearly a month saved per hire); locally reduced end-to-end time-to-hire to 10 weeks despite external checks.
- **Chester Zoo** - digitised approvals and new-starter packs, significantly reducing paperwork and admin time while improving candidate experience at high seasonal volumes.

Template:

Executive business case structure

1. Executive summary

- Problem statement
- Recommended solution
- Summary of benefits and costs

2. Introduction

- Purpose of the document
- Brief intro to the ATS vendor and its ATS platform

3. The case for change

- Limitations and pain points of current systems
- Hidden costs, inefficiencies, user dissatisfaction
- Alignment with business strategy

Solution overview – why a modern ATS?

- Proven results (with highlights in the success stories)
- Description of the solution
- Its key features and benefits list
- Functional superiority (with feature matrix examples).
- Real-world implementations (Active Care Group, St Helens Council)

4. Expected benefits

- List all efficiency gains
- Cost saving calculations (year-by-year) based on:
- Agency permanent placement fees
- Agency supply/temp/bank fees
- Any outsourced services for managing recruitment
- Advertising spend
- Any expected resource and headcount savings
- Increased compliance with DE&I targets

5. The cost model

- Costs of the ATS
- Reduced costs calculations based on efficiency gains and reduced headcount and expenditure

6. Implementation plan and timelines.

- Financial summary and how the Return on Investment (ROI) will be achieved

7. Additional considerations and support tools

- Cover plan for change and communications to drive adoption

8. High-level risks and mitigation plan

- The due diligence you have followed

9. Appendix

- Success story summaries and metrics
- Links to additional resources: webinars, blog articles, demos

Conclusion

Implementing a new recruitment platform is a strategic decision with the power to transform outcomes, candidate and user experiences, reduce costs and improve equity and candidate experience.

Define your goals clearly, measure them and ensure strong partnerships with internal stakeholders and your chosen vendor.

With the right technology, the right support and the right team, you will not only solve today's problems but future-proof your recruitment strategy and capability for years to come.

How can we help?

Read about [**our work with organisations here**](#) or contact us for an informal chat and we'll be happy to show you how we support a huge variety and size of organisations.