BEST IN CLASS
TECHNOLOGY FOR RECRUITMENT

Contents

Introduction

Best in Class Business Technology helps you to do more with less.

In the last few years, there have been rapid advances in cloud services, artificial intelligence, data management, IT services, and more that can make an impact on your business.

There are now so many business solutions available that it can be overwhelming and difficult to decide on the 'right' solution for your needs. You want to make choices that let you focus on your core business, not on the technology that helps operate it.

The solutions we offer in this document are those that are the most common and which we have tried and tested for our recruitment clients.

We recommend that all business carry out regular **System Improvement Reviews** to identify inefficient internal systems and processes, as well as new solutions on the market. These should focus on:

1. **Your Pain Points** - technology should help you run your business more efficiently, if it isn't, why is this? Do you require further training or is it out-dated and no longer suitable for your needs?

2. **Team Insights** - your team are the ones dealing with your systems day-in/ day-out. Speak to them, understand what their most repetitive tasks are and what is the most time-consuming part of their job. There might be new systems that can now improve these processes or the systems in place may no longer be suitable.

3. **Your Budget** - do you know how much you intend to invest each year on your IT infrastructure? This will help you prioritise on those tasks that need improving first.

Best in Class Business Solutions

The technology your business should be using.

RECOMMENDED
SOLUTIONS

CORE
SOLUTIONS

DEPUTY

6. Payroll

CHASER

2. Debtor
Tracking

MARKETINVOICE

7. Financial Services

BOMA

10. Online Marketing

T SHEETS by quickbooks

5. Time
Tracking

xero

1. Cloud
Accounting
Software

receipt bank

3. Bills and
Expenses

Workflow MAX a xero product

9. Project Management

FUTRLI

4. Reporting

Bullhorn

8. CRM

Cloud Accounting Software

Xero

- Get a clear overview of your financial position, whenever you need it
- Get paid faster with mobile invoicing and automatic reminders
- Multi-user access makes it easy to collaborate online with your team and advisors
- Save time on paperwork with automatic bank transaction imports and reconciliations
- Combine payroll with your accounting software

Our cloud accounting system of choice for small to mid-sized recruitment agencies is Xero. The beauty of this software is the flexibility it gives you to run your business from work, home, or on the go. You can be confident that you have an up-to-date picture of how your business is doing, no matter where you are.

By using an industry-leading Cloud Accounting system you get instant access to the information you really need, **putting you in complete control of your numbers and your business**.

Moving to an efficient, cloud accounting software is even more important with Making Tax Digital, which will mean that you will have to keep digital financial records and submit these to HMRC, at least quarterly. This comes into effect in April 2019 for VAT purposes and will affect agencies above the VAT threshold.

Debtor Tracking

Chaser

CHASER

- Get your invoices paid on time
- Automatically chase your invoices
- Create customised chaser emails
- Reduce your debtor days

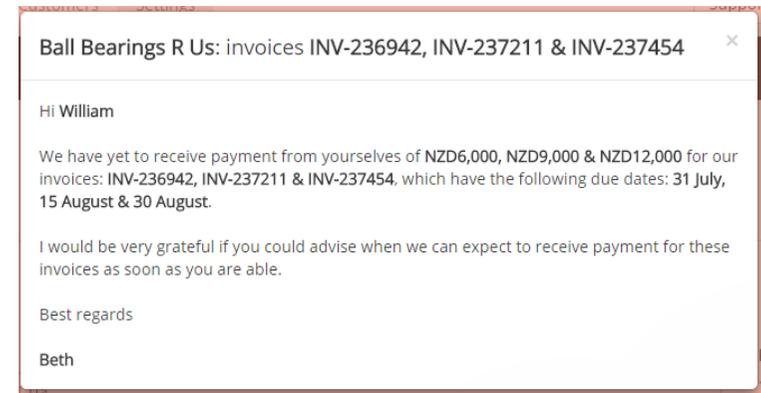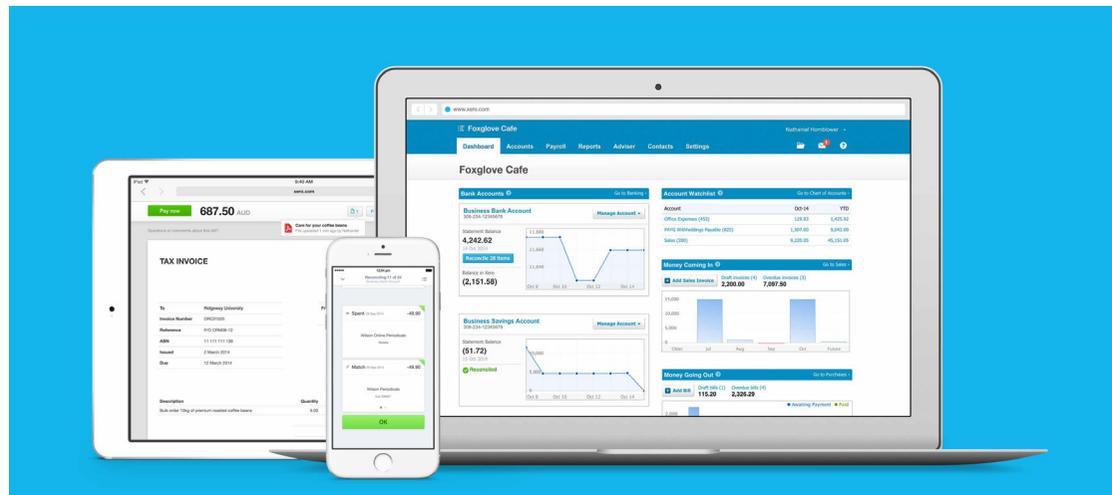**Chaser addresses two important problems:**

1. Getting your invoices paid on time. £225bn in late payments is owed to UK SMEs.

2. Time spent on chasing customers to pay invoices. UK SMEs spend 158m hours a year chasing invoices.

Chaser delivers an average 16-day debtor day reduction that is equivalent to a cashflow boost of over £4,400 for every £100,000 of turnover. Chaser also saves customers on average 7.3 hours per week on credit control.

Chaser securely connects to your Xero account and allows you to **set the chasers that you want your customers to receive**.

Chaser will never chase any unpaid invoices without notifying you beforehand. It will always have up-to-date information from Xero so invoices that have already been marked or reconciled as fully paid will never be chased. Chaser will also give you the flexibility to match what you would do if chasing personally: to chase different customers in different ways; and to chase multiple invoices for the same customer in one chaser rather than sending separate communications.

Bills and Expenses

Receipt Bank

- Simplify your expense process for the whole team
- Submit receipts and invoices whilst you are out and about
- Automate rules and processes to reduce time spent on bookkeeping
- No duplication or lost information as all data is saved securely in the cloud

Receipt Bank saves time through more straightforward and real-time accounting.

The key benefit of Receipt Bank is its simplicity, allowing you to easily get receipts and invoices into Xero. You can take a picture using the Receipt Bank mobile app, send an email to your unique Receipt Bank email address or link it straight up to your PayPal account. **Never will you have to worry about losing a receipt again**.

You can also use Receipt Bank to better manage your own and employee expenses. You can oversee the whole process, and become more efficient at doing your own bookkeeping, or you can take a picture and leave the magic up to your accountant.

Receipt Bank not only saves you time, but gives you the opportunity to stop working in your business and start working on your business: we know you didn't go into business to do bookkeeping.
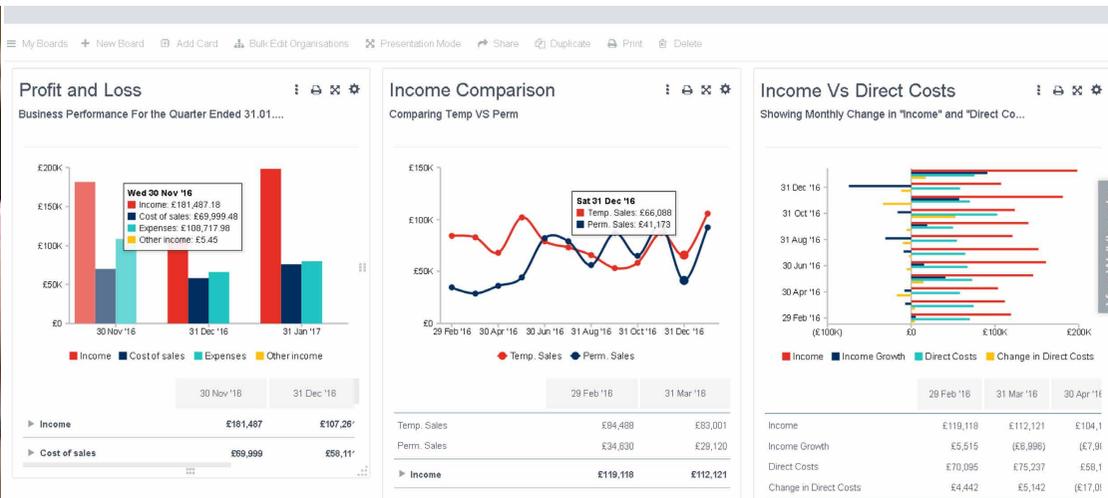
Reporting

Futrli

- View your cash and performance today
- Forecast automatically and explore unlimited scenarios
- Get unique business insights needed to make the right decisions
- Create a budget to track your expected sales and expenditure
- No more labour-intensive spreadsheets

Futrli works alongside Xero to provide you with complete clarity of your data, allowing you to visualise and track your financials, as well as plan for the future.

What makes Futrli so valuable is that every transaction from the beginning of time can be imported, which means absolutely any KPI can be looked at in real-time for operational, retrospective and future analysis. And if anything is amiss, you are always the first to know.

With Futrli, you can create anything from simple budgets to complex forecasts instantly and in a format to suit you. Ideal for any business meeting.

Essentially, **Futrli gives you back control**. Through connecting to Xero and its live bank feeds you can log-in at any point and have instant, up-to-date financial information about your business. Through gaining complete visibility, Futrli can help your agency grow and become more profitable.

Time Tracking

TSheets

- Easily track your employee's time
- Sync employee data for payroll and invoicing purposes
- Create reports to predict time needs for job costs and plan for payroll
- Increase productivity, improve management oversight and boost your team's productivity
- Identify profitable and unprofitable clients

TSheets works by automatically logging what your employees have been working on and how long they have spent on each task. You can also create schedules for your employees - assign or reassign tasks and see which employees are available to help with projects.

You can also see **which of your team are performing the best and reward them appropriately**, as well as spot areas of your business that may be unprofitable and costing you money. For instance, you can see exactly how much time has been allocated to each of your clients, and then plot that against the income you've received from that client to analyse if a profit has been made.

TSheets allows you to see easily what is going on within your recruitment agency.
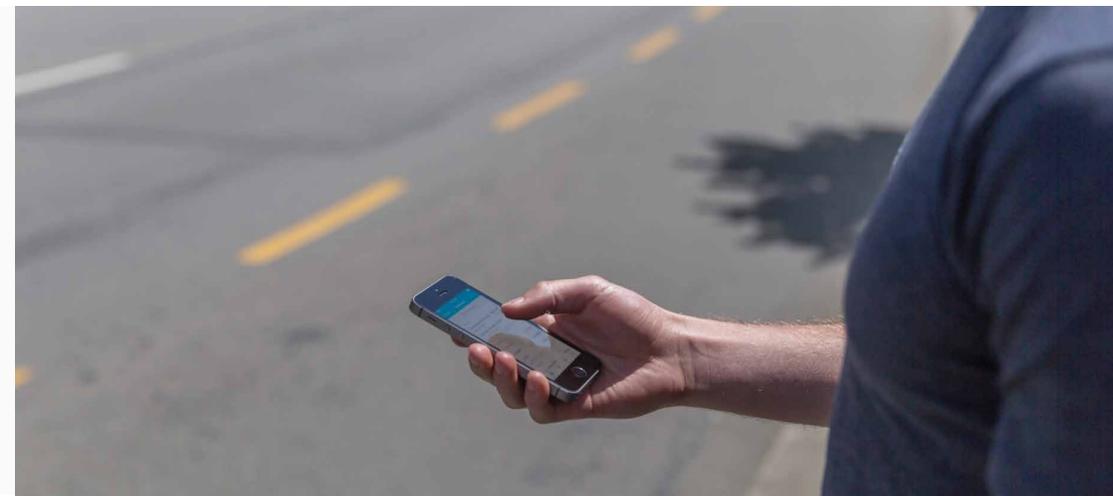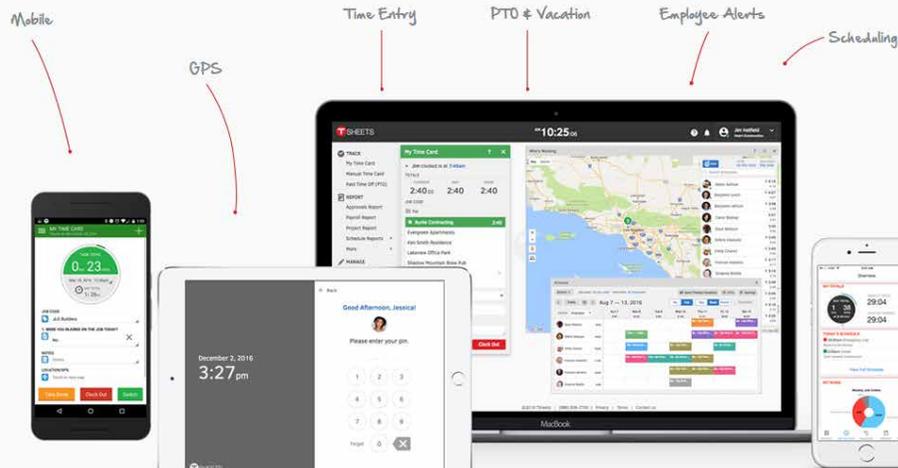
HR and Payroll

Deputy

- Automatically calculate overtime, penalty rates and allowances
- Completely scalable for businesses with 5 to 50,000 employees
- Find available staff, create and publish schedules in minutes

Deputy is an all-in-one employee scheduling, time and attendance and communication software that seamlessly integrates with Xero.

Deputy works for businesses with 5 to 50,000 employees and allows for easy integration with Xero. This means **any information can be synced, such as employee details, leave requests and timesheets**.

You can even streamline your invoicing by assigning billable hours to your clients based on employee timesheets.

Deputy is like TSheets, but also allows you to save time on payroll with its integration.

Optional Solutions
Financial Services

MarketInvoice

- Improve your cash flow with invoice finance and business loans
- Get funding against specific invoices from a single or handful of debtors
- Get funding against all your outstanding invoices
- Get funding against contracts, licences and retainers

MarketInvoice offers business loans and invoice finance solutions. Their integration with Xero means a quick and simple process, from application through funding.

Whether you are struggling to maintain a healthy cash flow or need access to cash to **take on new projects, invest in growth or pay your staff and suppliers**, MarketInvoice can help.

The integration with Xero also means you can apply in minutes. MarketInvoice will access the information they need to review your application, so you'll be done in just a few clicks.

Optional Solutions
CRM

Bullhorn

- Work faster and smarter
- Gain insight into client and candidate needs and requirements.
- Improve candidate experience
- Increase recruiter productivity

Bullhorn makes tracking communications, and acting on those communications, effortless. The system helps manage the end-to-end recruitment process, empowering recruitment professionals to automatically track candidates.

Bullhorn integrates with many systems, including Outlook, to enable interactions with clients and candidates to be automatically captured.

The system also gives recruiters the ability to **search 100million candidate records in half a second,** as well as find the most relevant candidates to create qualified shortlists easily.

Optional Solutions
Project Management

Workflow Max

- Create instant quotes for your clients
- Improve your cash flow with paperless and bulk invoicing
- Easily assign jobs, track timelines and receive notifications when projects are running late
- View performance reports at a glance and build your own

From leads to quotes, to time-tracking, all the way to invoicing - WorkflowMax all-in-one, cloud-based job management software is the modern and efficient way to run your business.

WorkflowMax offers you everything you need to manage your workflow in one single integrated cloud-based solution.

Optional Solutions
Online Marketing

BOMA

- Manage all your digital channels in one place
- Create email and social campaigns
- Get engagement insights to understand what your audience is most interested in
- Access a library of content to share with your audience

If you have limited marketing resources, BOMA makes it easy to deliver content to your audience, without having to invest time or resource into creating it yourself.

BOMA brings together all your email and social media platforms in one place. There's no need to switch between accounts or re-create content – with a few clicks, you can easily create and share content across all your communication channels.

BOMA also provides email template options making communicating with your customers easy, professional and cost-effective. There's no need for design skills or extra marketing resource.