



THE SELECT GROUP  
A TECHNICAL SERVICES FIRM



## The Select Group Facilitated HCM Software Training With Whatfix

### Company Description

By 2022, the HR software market is predicted to be valued at **more than US\$10 billion**. But in spite of the heavy investment in technology, 73% of HR professionals say that tech did not change the way they work, and eight out of 10 of them **struggle to use technology efficiently**.

**The Select Group (TSG)** is a technical services firm that offers clients fully-outsourced professional services, managed solutions, and project-based resources. They knew that transitioning to their new Applicant Tracking System (ATS), **Bullhorn**, would come with both benefits and challenges. So, while they were transitioning to Bullhorn, their learning and development (L&D) team was also looking for ways to ease those transition pains through moment-of-need training.

They invested in Whatfix, a digital adoption platform (DAP), to give their recruiters 24/7 access to real time guidance and in-application, on-demand platform Flows. TSG also used the DAP to share company-wide best practices and enable recruiters to get answers to their questions autonomously.

Through digitizing their onboarding and training programs, TSG was able to speed up their new employees' time to competency and help tenured employees and managers use Bullhorn more efficiently.

### TSG Needed to Train Their New Hires More Efficiently and Give Tenured Employees Easier Access to Information

**TSG's mission** is to “positively impact lives, one experience at a time.” To continue working toward their mission, TSG had to pivot into the digital era, which is why they invested in Bullhorn. But change is difficult and oftentimes painful – especially when it requires training new and existing employees to use new tools and systems.

To ease those transition pains, TSG needed a way to make their training more efficient and more accessible across geographies and all levels of seniority. They sought a digital alternative to flying all their new hires (hired on a monthly basis with 175-200 people trained annually) to their headquarters in Raleigh, North Carolina, for their instructor-led training (ILT) and onboarding programs.

### TSG Provided Just in Time Training with Whatfix's Self Help

While searching for different digital training solutions, **Eric Castorina**, Director of Learning and Performance at TSG, came across Whatfix. The DAP had all the features they were looking

for in a training solution: fully digital in-application guidance, just-in-time training and support, and an easily searchable help.

TSG created **Flows** and help content for all their major Bullhorn business processes for both onboarding and training purposes. They had Flows for simple tasks, like how to change your password, and more complex ones, like how to create automated workflows. Whatfix guided recruiters, no matter their career stage, to become more proficient with Bullhorn and, by extension, provide better services for their clients.

TSG housed their Flows and help content within **Whatfix's Self Help** that could be accessed anytime within the Bullhorn application. All users had to do was click on the Self Help tab on the right-hand side of their Bullhorn window, and a menu would appear with a list of helpful Flows and a **search bar**. Recruiters could find answers to their questions in two clicks or 10 seconds, which was especially useful when they were on calls and needed help at that moment

After initially setting up their training programs, TSG started experimenting with the Whatfix team on using their content within Self Help as a springboard for information that lives in other applications.

The Whatfix team worked with TSG to link relevant content, both within Self Help and TSG's content repositories. That way, when a recruiter needed information, they would get a comprehensive list of useful resources—

including curated videos and eLearning modules—that would point them in the right direction.

“Nothing irritates me more than whenever I’m trying to partner with a company and they don’t really receive my feedback or are not willing to test the limits and see what we can do,” Castorina told us. “And the Whatfix team was the opposite. They went above and beyond to make our roadmap within Self Help go from a concept to what it is today. So I was really, really happy with that.”

TSG also used **Whatfix Analytics** to guide its content creation. Analytics showed TSG's L&D team its recruiters' successful and unsuccessful search queries. From there, the L&D team could identify unsuccessful search query trends and create the appropriate help content.

## TSG Improved and Accelerated HCM Adoption Across Different Levels of Management

The Flows TSG created helped recruiters using Bullhorn daily, as well as managers and C-suite employees using Bullhorn less frequently. Managers leveraged Whatfix for coaching and showing their teams how to do the job. They also used Whatfix to refresh their memory on Bullhorn processes and support their teams better.

### Benefits to Business

Faster  
Time to  
Competency

88.81%  
Successful Self  
Help Searches

#### Self Help Search Success



#### Unsuccessful Search Terms

Search Term	Frequency
retain	3
xchecker	1
retainers	1
disclsimers	1
pssc	1
bolea	1
DBS	1
retainer	1
Disclosure	1
mail	1

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TSG also noticed their new employees, from fresh grads to more tenured, learned how to use Bullhorn and hit traditional milestones comparatively faster. With Whatfix DAP, new hires onboarded quicker, became productive faster, and were less reliant on virtual ILT courses.

Recruiters used Self Help 411 times over the course of about eight months, with 88.81% of those searches successful (8.81% higher than the industry standard).

And with TSG continuing to create more Flows and help documents, the number of successful search queries keeps improving.

In addition to Flows and Self Help, TSG uses **Pop-ups**, information widgets that contain text, Flows, videos, surveys, or GIFs, for Bullhorn announcements and Flows demonstrating best practices. They also use **Beacons** to highlight important features that are easily overlooked.

## The Select Group Plans to Keep Innovating Their Training Programs with Whatfix

The Select Group plans to keep using Whatfix in innovative ways to improve employee training and empower employees to deliver on their overall mission of helping others achieve their professional goals.

Adding a **Task List** for onboarding and expanding access to Whatfix beyond their recruiters (i.e. their sales teams) with Whatfix's **Role Segmentation** feature are just a few.

