

From sourcing to onboarding: **Redefining recruitment processes with low-code**



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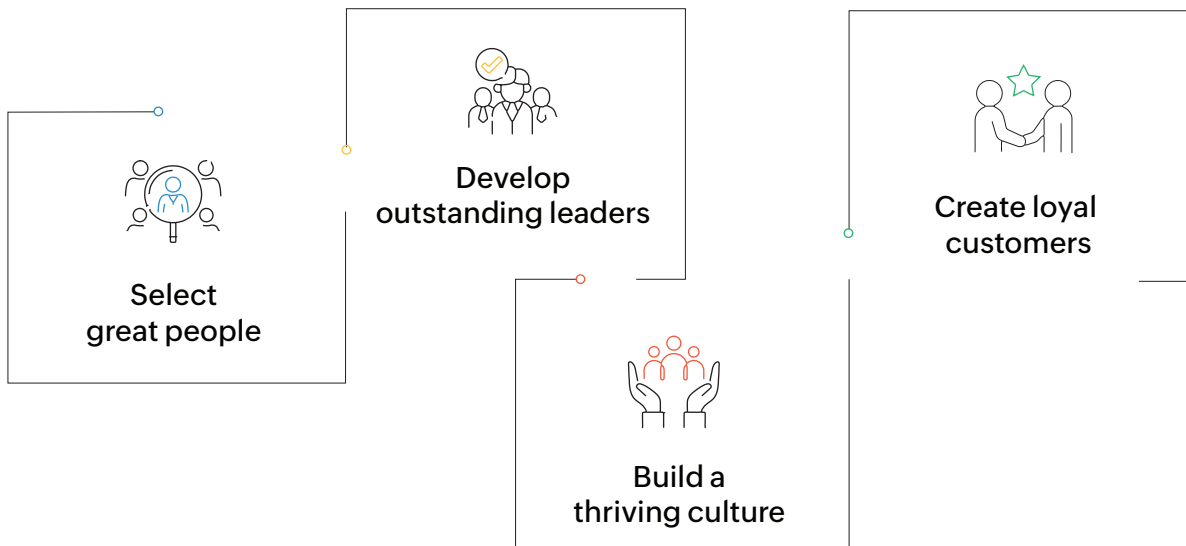
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The company

Leadership Alliance, founded in 1998 by Karen Weller, Ph.D., specializes in helping organizations hire, develop, and promote the right candidates for the right roles, utilizing science and psychological insight. Over more than twenty years, the company has helped hundreds of businesses—many of which are Fortune 500—use data to instill confidence in their hiring decisions.

In 2021, Leadership Alliance was acquired by Chapman & Co. Leadership Institute, a consulting company that partners with organizations to deliver customized training and events, assessments, and consulting services. Having worked with over 600 organizations from 30 nations around the world, Chapman & Co. creates strategic visions that improve corporate cultures, develop outstanding leaders, and engage employees and customers.

The company is a B2B consulting group that helps organizations:



As a part of Chapman and Co.'s talent management practice, Leadership Alliance offers companies top data analysis and recommendations for hiring, with a swift turnaround made possible by Zoho Creator.



Our consultant group consists of PhD-level psychologists, using a best-in-class comprehensive battery of assessments to determine if our clients' candidates will be a good fit for the roles that they're hiring for, with the culture of their organization in mind.

— **David Weller**, Partner, Chapman & Co. Leadership Institute



The challenges

Testing job candidates, conducting interviews, and consulting on hiring decisions had been managed with a paper-and-pencil process to track candidate progress. But as Leadership Alliance quickly expanded to 10 consultants and over 3,000 assessments annually, they had no choice but to digitize their processes.



Our manual process worked well when we were a couple of people in an office. But as we expanded, it didn't work for people that weren't physically located in the office. So we had to find something more web-based.



— **Susan Godbey**,
Operations Leader, Chapman & Co. Leadership Institute



The company required a flexible way to present data that could accommodate different views, based on the roles of its team members—including those responsible for assigning work, managing clients, and evaluating candidates. This approach ensured that relevant information about clients and candidates was readily available, enabling the appropriate support person or consultant to be quickly identified and contacted when needed.

They also needed accurate order histories and the testing preferences of their clients. As organizations often need to make quick hiring decisions, Chapman & Co. needed to process orders quickly and vet candidates onto the testing platform.

Traditional talent acquisition methods relied heavily on resumes and personal interviews, making evaluating a candidate's fit for the job and organization challenging. Leadership Alliance adds a comprehensive battery of assessments to the hiring process, but they needed insight into the analytics of its testing process and faster tools to aggregate the candidates' test scores.

The solution

Leadership Alliance used spreadsheets to track their data until 2016, when they realized it would be a long, drawn-out process for an expanding company. That's when they reached out to their IT provider in search of something like Microsoft Access—but more cost-efficient. The team introduced them to Zoho Creator, which was a great fit for a budding organization like theirs.

Starting small

After adopting Zoho Creator, the company started at the most basic level—making a form based on their spreadsheet and the manual method they used to collect client preferences and candidate details. The next step was to familiarize the team with the app, instead of filling in and tracking data on spreadsheets. It was crucial that the team could quickly experience the benefits of the applications and get excited for more and more ways to deploy it for their processes.



Initially, the support team used Zoho Creator, where their assessment process was built. From the app, they would note their clients' preferences to customize the test process and then track candidate progress.

Scaling up

The company offers a wide range of services with different price points, all housed on the Zoho Creator platform. They get about 300 orders a month and only need a handful of staff for managing their accounts and invoicing. The app generates pop-ups with the client's preferences in the assessment module, and, on adding those, it automatically adds the price for a particular service on the invoice.



After a few years, the company expanded the app to their consultant base. A task list is now created for each consultant, which helps them prioritize their work and make quick decisions. It also gives upper management an overview of what's on each member's plate.

Exploring new possibilities

In 2020, the company built a second application set up with an API from the test provider, through which the test scores reflect in real time in the app. The candidate is generally taken through six assessments, which have about 150 data points, concerning personality and cognitive scores. The ability to combine client and candidate data with test scores has allowed Leadership Alliance to help clients compare one individual with others who have tested for the same position, which allows them to make even better predictions in terms of who will be successful on the job.



An intuitive dashboard, built using Zoho Creator's built-in Zoho Analytics integration, helps aggregate all the scores and gives a fair idea of a candidate's performance compared to others in the same group.



It's amazing how easy it is to move and display data between applications with Creator. The ability to create very customized lists is exceptional. Our Zoho administrator can customize in-house, on a client-by-client basis, without an external developer. We track a lot of information about our clients, and the little things don't get missed anymore.



— **Susan Godbey**,
Operations Leader, Chapman & Co. Leadership Institute



Benefits and ROI

Leadership Alliance initially had five support staff tracking candidates, which is now down to three, with the others moving to different roles. With the business expanding over the last five years, the company has simultaneously expanded its consultant base, who now have extra time to do their job rather than doing admin work.

Shuffling between folders and trying to figure out task priority used to be challenging. The team fully realized this when they automated their first task on Zoho Creator. Creating a day-to-day task list for the team was smooth sailing, and productivity boomed. The invoicing experience has also improved considerably, with no more need to add price points for each customization manually, making it fool-proof and time-saving.

The company also created a comprehensive dashboard using the data from their test provider, for a more holistic view of candidate performance. They now have access to up-to-date information and can make informed decisions based on the latest data. The team can even share data with clients who want to track their candidates' performance—and business partners can use widgets to follow their KPIs and make business decisions quickly.



The application is very intuitive, comprehensive, and user-friendly.

— **Jessica Rusnack Ph.D.**, Principal, Chapman & Co. Leadership Institute



Looking forward



The company is exploring more with their Creator applications, integrating all their business applications to increase functionality and find ways to better present the data in client-facing reports.



I'm always interested to learn how to use Creator in ways I haven't thought of and see what other people are doing with the application. It's great to find usages that spark the imagination within the user community and discover fresh and better solutions.



— **Susan Godbey**,
Operations Leader, Chapman & Co. Leadership Institute



About us

At Zoho Creator, we've always worked towards a single purpose—empowering users to build functional apps with minimal coding expertise. We've helped **14,000+** brands create bespoke solutions and improve their end-to-end operations across a variety of industries. With over **16 years of experience** in catering to **B2B and B2C organizations**, we have the best tools in the trade to help you improve your business.

You can get started with Creator by visiting our [signup page](#). You can also check out our [prebuilt apps](#) to get started right away.





Creator

We'd love to talk! Reach out to us

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