access
freedom to do more

G-Cloud15
Access Recruitment CRM
Service Definition

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1 Service Overview

Access Recruitment CRM delivers end-to-end recruitment management that accelerates placements, streamlines operations, and scales with your business. From permanent workflows with built-in BD tools and video interviewing, to sophisticated temporary staffing with drag-and-drop scheduling and real-time placement tracking, ARCRM provides the complete toolkit modern agencies need. Our extensible platform adapts to your unique processes through tailored workflows and custom applications, whilst AI-powered capabilities and seamless integrations ensure ARCRM remains your single source of truth across the entire recruitment lifecycle. Trusted by 40% of the UK's top 500 recruitment agencies, ARCRM delivers enterprise-grade capability with the flexibility to serve ambitious independents through to national operations.

Core Features:

Temporary Staffing Excellence

- **Scheduler** – Drag-and-drop functionality to book shifts at speed, complemented by progressive web app-based portals enabling workers to manage availability on the go
- **Placement Manager** – Intuitive daybook view providing real-time visibility of shift attendance and worker status
- **Availability Manager** – Complete oversight of worker availability with broadcast-to-clients functionality for rapid shift filling
- **Powerful Searching** – Advanced search capabilities to rapidly find the right workers based on skills, availability, location, and compliance requirements
- **Timesheet Management** – Seamless hours capture and timesheet amalgamation streamlining pay and bill processes

Permanent Recruitment Power

- Comprehensive permanent workflows with full-cycle placement management
- BD tools, mass email/SMS functionality, and interview scheduling capabilities
- Built-in video interviewing tool for enhanced candidate and client experience
- Fast-track candidate progression from sourcing through to placement

AI-Powered Intelligence

- HireAra – AI powered sourcing & candidate packaging
- smartAI – Intelligent automation and insights that enhance decision-making and accelerate workflows
- Business Growth AI – Transform consultants from cold-callers into warm connectors with AI-driven networking capabilities
- Predictive Analytics – Leverage AI to identify opportunities, optimise placements, and forecast business trends

Extensibility & Customisation

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- **Tailored Workflows** – Configure core processes to match your unique business requirements
- **Custom Applications** – Build bespoke apps using our Apps and Widgets framework to accelerate specific workflows, or leverage Evo for rapid low-code development
- **Evo Development Services** – Dedicated technical team available to create functionalities aligned to your business rules
- **Data Capture** – Create custom fields ensuring capture of all business-critical data points

Integration & Connectivity

- **Powerful API** – Seamlessly connect external systems with ARCRM as your central source of truth
- **Portals** – Two-way sync for candidate onboarding, client requests, and timesheet submission
- **RecOS Platform** – Complete end-to-end process integration across Access Recruitment's multi-product ecosystem including Access Pay and Bill, HireAra, Access Attract, Elay, Onboarded, and smartAI
- **Third-party Integrations** – Ever-growing integration library ensuring ARCRM connects with your existing technology stack

Intelligence & Analytics

- **Workspace Analytics Dashboard** – Unrivalled business insights spotting opportunities for improvement and growth
- **Access Analytics** – Blend data across systems for unique business views that supercharge performance and productivity

Enterprise Foundation

- **Cloud-based** – Always up-to-date, secure platform with automatic updates
- **Audit Trails** – Real-time activity logs tracking consultant and client interactions for complete transparency

Strategic Value:

ARCRM delivers transformative value to recruitment agencies of all sizes, from ambitious independents through to national operations managing thousands of placements annually. Our scalable architecture ensures you're never constrained by your software—whether you're a boutique agency seeking competitive edge or an enterprise operation requiring robust, multi-office functionality.

Competitive Differentiation – Our market-leading Access Evo platform combined with the Apps and Widgets extensibility framework empowers agencies to configure unique workflows and create bespoke solutions that reflect your competitive advantage. Move

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beyond rigid, one-size-fits-all CRM limitations and build the system that works the way you do business.

Operational Excellence at Any Scale – AI-enhanced integrated workflows across candidate sourcing, client management, and placement administration reduce manual tasks and accelerate time-to-placement for teams of any size. Whether you're managing 10 placements or 10,000, consultants can focus on relationship-building and revenue generation rather than administrative burden.

Future-Proof Investment – As your agency grows, ARCRM grows with you. Start with core functionality and expand into advanced features like custom applications, AI powered functionality, EVO App Builder for low-code development, dedicated development services, and enterprise integrations as your business demands. There's no need to migrate systems as you scale—your investment compounds over time.

Compliance Confidence – Built-in compliance frameworks covering AWR, National Minimum Wage, and emerging Employment Rights Act requirements ensure agencies of all sizes stay ahead of regulatory changes whilst minimising administrative complexity. Smaller agencies gain enterprise-grade compliance without enterprise-grade overheads.

One Source of Truth – Through seamless integration with the broader Recruitment Operating System—including Access Pay and Bill for back-office operations, HireAra for AI-powered sourcing, Access Attract for candidate attraction, Elays and Onboarded for streamlined onboarding and compliance, and smartAI for intelligent automation—ARCRM becomes the central nervous system of your recruitment operation. Data flows intelligently across your ecosystem, ensuring consistency, accuracy, and actionable insights regardless of your agency's size or structure.

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2 Onboarding

Each FlightPath implementation programme from Access follows a well-defined journey with key milestones. These milestones represent -- at a high level -- the individual phases of your implementation journey. We'll be using these milestones to help us both track and communicate progress towards successfully launching to your users. Our aim is to give you value from your investment as quickly and as fully as possible.

At the 'Getting Started' milestone phase, you will receive a Welcome Pack. In here you'll find clarity on roles and responsibilities. What you'll need to do, and what we will do. Crucially our FlightPath approach also clarifies our joint expectations, helping us both understand the process that we will jointly commit to, in order to successfully launch your chosen software to your end users in a timely and efficient manner.

We offer three FlightPath tiers for implementing Access Recruitment CRM, structured across two distinct implementation paths: New Business FlightPaths for organisations new to Access, and Destination FlightPaths for businesses migrating from legacy desktop products. Each FlightPath follows an 8–12-week onboarding process from the initial Welcome Call, incorporating design consultancy, bespoke front-end development, regular project reviews with your dedicated Onboarder, early access to your website and online Learning Management System, plus comprehensive go-live and post go-live support.

The below 3 FlightPath options feature a bespoke homepage with sophisticated templated sub-pages. There are also options with fully bespoke sub-pages.

All 3 options follow the same onboarding process but are differentiated by product features.

New Business FlightPaths

New Business FlightPath A

Access Evo implementation of Access Recruitment CRM Level 1 over 13 weeks (10 weeks active client engagement) ideal for businesses with 1-10 users, including: cloud software; email integration; CV parsing; online training and walkthroughs; auto-match; customisable fields; language pack; temp scheduler; timesheet management; high volume temp placement; report building; compliance; advanced rate management; API; 5 basic workshop sessions (1 hour each); 4 basic remote training sessions; access to LMS learning modules; Go Live support (15 hours over 2 weeks). Standard imports included data migration or custom imports available as additional services.

New Business FlightPath B

Access Evo implementation of Access Recruitment CRM Level 2 over 15 weeks (11 weeks active client engagement) ideal for businesses with 10-25 users, including: bi-weekly

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project management support; cloud software; email integration; CV parsing; invoicing (2 branded templates); online training and walkthroughs; auto-match; customisable fields; language pack; temp scheduler; timesheet management; high volume temp placement; report building; compliance; advanced rate management; API; 11 workshop sessions (3 hours each) covering configuration review, applicants/clients/contacts, rates, job flows, searching and reporting, compliance deep dive, timesheets and payroll, template review, internal documentation review, end user training plan review; 6 basic remote training sessions; access to LMS learning modules; Go Live support (15 hours over 2 weeks). Data migration not included and must be scoped separately.

New Business FlightPath C

Access Evo implementation of Access Recruitment CRM Level 3 - Consultant-led implementation over 17 weeks (13 weeks active client engagement), ideal for businesses with 10-25+ users, including: bi-weekly project management support; cloud software; email integration; CV parsing; invoicing (2 branded templates); online training and walkthroughs; auto-match; customisable fields; language pack; temp scheduler; timesheet management; high volume temp placement; report building; compliance; advanced rate management; API; 11 workshop sessions (2 hours each) covering configuration review, applicants/clients/contacts, rates, job flows, searching and reporting, compliance deep dive, timesheets and payroll, template review, internal documentation review, end user training plan review; 18 remote training sessions covering Temporary, Contractor and Permanent recruitment workflows; access to LMS learning modules; Go Live support (15 hours over 2 weeks).

Destination FlightPaths

Destination FlightPath A

Access Evo implementation of Access Recruitment CRM. Self-service migration over 15 weeks (11 weeks active client engagement); ideal for businesses with 1-15 users migrating from RDB, including: bi-weekly project management support; data upgrade from RDB to ARCRM; cloud software; email integration; CV parsing; online training and walkthroughs; auto-match; customisable fields; language pack; temp scheduler; timesheet management; high volume temp placement; report building; compliance; advanced rate management; API; Drive Time widget; invoicing (2 branded templates); 11 workshop sessions (2 hours each) covering configuration review, applicants/clients/contacts, rates, job flows, searching and reporting, compliance deep dive, timesheets and payroll, template review, internal documentation review, end user training plan review; 6 basic remote training sessions; access to LMS learning modules; Go Live support (15 hours over 2 weeks).

Destination FlightPath B

Access Evo implementation of Access Recruitment CRM - Consultant-led migration over 18 weeks (13 weeks active client engagement); ideal for businesses with 10-25+ users migrating from RDB, including: bi-weekly project management support; data upgrade

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from RDB to ARCRM; cloud software; email integration; CV parsing; invoicing (2 branded templates); online training and walkthroughs; auto-match; customisable fields; language pack; temp scheduler; timesheet management; high volume temp placement; report building; compliance; advanced rate management; API; Drive Time widget; 11 workshop sessions (2 hours each) covering configuration review, applicants/clients/contacts, rates, job flows, searching and reporting, compliance deep dive, timesheets and payroll, template review, internal documentation review, end user training plan review; 18 remote training sessions covering Temporary, Contractor and Permanent recruitment workflows; access to LMS learning modules; 6 ad hoc consultancy support sessions (2 hours each, bi-weekly); Go Live support (15 hours over 2 weeks).

Organisations with 50-100+ users are likely to require a full consultancy project-based implementation tailored to their specific needs.

3 Additional Service Options

The table below highlights the additional value-added services that our consulting teams can provide. Please take some time to review these.

REMOTE – Consultant Led Training Session	**Expert guidance, wherever you are.** Book an additional remote training session with one of our expert consultants — tailored to your needs and designed to help your team get the most out of ARCRM
On-Site Floor Walking	**Hands-on help, right where you need it.** Want extra support during GO LIVE? One of our consultants can come to your site to floor walk — offering real-time guidance, answering questions, and helping your team feel confident using ARCRM from day one.
REMOTE - End User Training - Webinar	**Train your team, your way.** Join a 2-hour remote webinar session designed to guide your end users through ARCRM. The session can be recorded and shared for future reference. Participants stay on mute while your Project Manager collects questions in advance, followed by a 1-hour Q&A session with our ACS Consultant to ensure every query is answered.
On-Site - End User Training - Bespoke	**Tailored training, delivered in person.** Get hands-on, personalised training for your team with one of our consultants on-site. This bespoke session is designed around your specific needs, helping your users gain confidence and get the most out of ARCRM from day one
Project Accelerator - ARCRM Foundations - On Site	**Kickstart your success, face-to-face.** Get tailored, hands-on training delivered on-site by one of our consultants. This intensive session covers the foundations of ARCRM, helping your team quickly understand the system, align processes, and accelerate your implementation journey.
Project Accelerator - Temporary Workflow & System Set Up - On Site	**Streamline your temp desk, face-to-face.** Get tailored, hands-on training delivered on-site by one of our consultants. This intensive session focuses on configuring your temporary recruitment workflows and system setup — helping your team optimise processes and accelerate success with
REMOTE – Consultant Led Training Session	**Expert guidance, wherever you are.** Book an additional remote training session with one of our expert consultants — tailored to your needs and designed to help your team get the most out of ARCRM
Project Accelerator - Pay & Analytics - On Site	**Master payroll and reporting, face-to-face.**

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	This on-site accelerator session covers everything from timesheet management and payroll processing to reporting and analytics. Delivered by one of our consultants, it's designed to help your team confidently manage pay and gain valuable insights from your data
Level 1: Reactive PM service. Check-ins at key milestones or a maximum of every two weeks.	**Essential guidance, milestone driven.** Designed for 15-week projects, this entry-level PM service provides reactive support with check-ins at key milestones or every two weeks. Your Project Manager acts as an escalation point and ensures the basics are covered to keep your project moving.
Level 2: Proactive PM. Weekly check-ins, active RAID and plan management. Project Sponsor is reactive.	**Stay ahead, stay in control.** Our Level 2 PM service offers proactive, hands-on support with weekly check-ins, active RAID log management, and detailed project planning. While your Project Sponsor remains reactive, your dedicated PM ensures momentum, clarity, and accountability throughout the project.
Level 3: Proactive PM. Weekly check-ins, active RAID and plan management. Project Sponsor is proactive with regular steering calls.	**Confident delivery with strategic oversight.** Designed for 15-week standard projects, this advanced PM service offers proactive support with weekly check-ins, RAID and plan management, and active involvement from your Project Sponsor through regular steering calls.
Level 4: Proactive PM + Programme Manager. Weekly check-ins, active RAID and plan management. Includes cross-division coordination, proactive Sponsor, and steering calls.	**Enterprise delivery with full coordination.** Designed for complex, cross-division projects, this top-tier PM service combines proactive project management with programme-level oversight. With weekly check-ins, active RAID and plan management, and regular steering calls, your Project Sponsor plays a key role in driving success
REMOTE - ARCRM Third Party Integrations	**Connect ARCRM to your wider tech stack.** Integrate ARCRM remotely with third-party systems to streamline workflows, reduce duplication, and enhance productivity. Whether it's payroll, CRM, or communication tools — we'll help you scope and connect the systems that matter most to your business.
Evo Solution Service Additional Invoice Branding and Scope	**More templates, more flexibility.** Need more than the standard two invoice templates? Our Evo Solutions Services team will work with you to scope and brand each additional template — ensuring your invoicing reflects your business perfectly.
SMS - Initial Set Up	**Connect instantly, communicate effortlessly.** We'll configure inbound and outbound SMS with email alerts to keep your team connected. Just ensure your SMTP details are correct, and we'll take care of the rest
SMS - Change of Set Up	**Update your SMS settings with ease.** Need to change your SMS configuration? Our team will support you through the setup update — ensuring your messaging is aligned with your business needs and ready to go.
API Spin Ups	**Get connected, fast.** We'll spin up your API environment early in the project, giving your technical team access to the tools and documentation needed to start building integrations and connecting ARCRM to your wider tech stack
ARCRM Data Import Package	**Seamless migration, expert support.** This comprehensive data migration package is designed for projects outside of standard flightpaths. It includes consultancy, validation, and multiple import stages to ensure your data is accurately and securely transitioned into ARCRM. **What's included:** • First standard database import • Consultant review of initial import • Data validation workshop • Data amendments • Second/final standard database import • Consultant review of final import
ARCRM Data Imports Custom Imports	**Custom data, tailored setup.** For new business clients, we offer custom data imports into ARCRM. These are scoped directly with your ACS Consultant to ensure your data is accurately mapped and integrated to suit your specific needs
ARCRM Data Imports - Additional time required for Data Migration - Standard Imports	**Flexible data imports, when you need it.**

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	Whether you're planning a staged go-live or need extra data imported into your LIVE or Test environment, we offer additional data import services. Each import is scoped separately to ensure accuracy and alignment with your project needs.
DATA BASE DATA MIGRATION	**Plan your migration with precision.** Join a dedicated session with your ACS Consultant to scope and map your database data migration. We'll assess your requirements and provide a tailored quote to ensure a smooth and accurate transition into ARCRM
FlexPoints	Access FlexPoints are a cost-effective, flexible way to easily access and consume value added services including customisation, training, integration, analytics or reporting, as your business needs evolve. Access FlexPoints provide a simple way to create an allocation of points that you can call on at any time to spend on Access services. Having a banked allocation of FlexPoints provides the reassurance that as your business needs evolve you can use them to extend and modify your use of the technology.

4 Service & Support Management Details

Providing you and your users with a high level of incident support is of prime importance to us. As well as being able to answer your queries, our support staff will also be able to inform you about the latest software releases and provide hints and tips to ensure you are getting the most out of your product. To emphasise the importance of support to Access we have over 500 employees in the UK in our Support and Customer Success functions.

Support Commitment

We recognise that the systems, software and services we supply may be critical to the well-being of your business. Our aim is to ensure that you have continuous operational capability from our products. We will help you to achieve this by providing efficient support, resolving the majority of tickets at first-line contact.

We will help you maximise your return on investment by providing the best in technical assistance, advice and customer care. We own your support queries and will ensure that they are resolved as promptly and efficiently as possible.

We provide 3 main support plans for Access Recruitment CRM as detailed below.

The Essential Plan

The online service The Essential Plan is available to all Access customers as part of your license fee and provides you with easy-to-access online support for all your queries, facilitated via our Customer Success portal.

The Standard Plan

Get answers faster

As a Standard Plan customer, you benefit from faster response times and can access our support teams via telephone and live chat, as well as through our Customer Success portal. To help your team be more productive, you are provided with continued access to our e-learning content as well as a programme of Success webinars, designed to keep you up to date with new features and share best-practice advice and guidance.

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The Premier Plan

Boost productivity with direct access to the experts and achieve a higher return on investment

Our Premier Plan enables your team to achieve more and improve productivity through an ongoing relationship with your own designated Customer Success Manager. Your CSM will get to understand how you're using the technology and will advise you on how to get more from it.

Full details of our Customer Success Plans can be found here Access Customer Success Plans

Get to know our knowledge base

Knowledge Base is our huge database of commonly asked questions, articles and videos. All you need to do is Register and Login and you can find the answers you need any time of the day.

The advanced search function not only searches articles from Knowledge Base, but links up with our Community hub to display the topics that you need. So you've got everything you need all in one place.

Can't find the article to answer your question? Not a problem. Each article links to our Community so you can ask a question, or to raise a case with the Access team.

Support Assistant

Customers will also benefit from our Digital Assistant which is available 24/7 and can easily handle all commonly asked questions.

Got a question? Ask our Community

Community connects our customers together to help them solve problems and share how to get the very best out of their Access products.

Our customers know more about using our products in their jobs than anyone else. Community gives you the chance to receive – and share – friendly expert advice that goes beyond normal customer support. Discover best practice hints and tips from peers in your industry to help you make the most of your experience with your Access product.

Each of our products has its own dedicated Community, so you can get straight to the discussions that matter to you. No unnecessary searching needed.

If a question can't be answered by Community a member of the Access team will reply. We'll make sure that no query goes unanswered.

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5 Account Management & Customer Success

With over 160,000 customers using products supplied by the Access Group we have a large team involved with ensuring that our customers are able to build on their investment with Access.

This includes the Customer Success team who are specialists in specific products whose role is to ensure that our customers on Standard and Premier Success plans benefit from educational webinars to ensure that you are always taking advantage of new functionality and most importantly continuing to adopt best practice in the day to day use and set up of the software.

Our Account Management team work with our customers specialising in vertical sectors or specific products. Depending on the complexity of the customer these are either office based using the latest technology to provide our customers with the highest possible levels of service or will visit sites for face to face meetings.

Our Account managers work with you keeping our customers informed on the way emerging technologies can help their business. They prepare briefings on the business, technical and financial benefits of technology and collaborate with customers to ensure the customer is aware of the breadth of software and support that Access can provide.

6 Outage and Maintenance Management

Outage Reporting - Customers can subscribe to email alerts giving updates on scheduled maintenance and outages. We also provide all our customers with a live dashboard so you can also review uptime statistics.

Maintenance Management -- downtime due to maintenance is very infrequent and is run outside of normal working hours with all customers being informed in advance to minimise disruption.

7 Backup and Disaster Recovery

The solution has been designed to cater for disasters ranging from a database restore through to a complete datacentre outage.

All backups are stored on disk and are retained for a period of 12 Months, financial data is kept for 7 years.

Backups are stored within a multi tenancy data vault and are encrypted at rest. The design of the architecture means that all data is simultaneously available in both the primary datacentre and the secondary datacentre meaning data is always backed up to another geographically diverse site.

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All Servers are backed up on a daily basis at 10pm. These backups go directly to storage in the DR Datacentre to ensure off-site availability.

Retention for backups:-

15-min SQL	28 days
Daily	28 days
Weekly	3 months
Monthly	1 year for non-financial data /7 years for financial data

The solution has been designed to deliver Recovery Point Objective (RPO) and Recovery Time Objective (RTO) using the following definitions:

- RPO is the maximum time period in which data might be lost.
- RTO is the duration of working time within which data should be restored after a disaster. This time starts from when a support call is logged with Access.

Standard Restore Testing
We undertake a restore test automatically on a weekly basis.

DR Testing
We run a full DR test on a 6 monthly basis, this is a non-invasive test where we bring the DR site up in an isolated fashion to ensure the services recover (Zerto allows us to do this without bringing the production environments down).

SQL Server
SQL Server Full Database backups are taken overnight as well as having SQL transaction logs taken at 15 minute intervals. This allows a database to be restored to an overnight position or to be restored to a chosen point in time within the day.

Frequently a database is restored following a user accidentally changing lots of data so the RPO does not always apply as the user may have changed the data several days ago, however the solution has been designed with a maximum RPO of 12 hours and a RTO of 6 hours.

Single Virtual Machine Failure – IIS or RDS Server
In the unlikely event of a single virtual machine (VM) failing (e.g. the IIS VM ceases to respond but the other VMs are still functioning correctly) then a new instance of the VM will be started. This new instance will be an exact copy of the VM from when it stopped responding. The solution has been designed so that the files on an IIS and RDS server are fairly static with an RPO of 12 hours and a RTO of 6 Hours.

Single Virtual Machine Failure – SQL Server
In the unlikely event of the SQL Server virtual machine (VM) failing then a new instance of the VM will be started. This new instance will be an exact copy of the VM from when it

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stopped responding. The solution has been designed with an RPO of 12 hours and a RTO of 6 Hours.

Complete Primary Datacentre Outage
In the unlikely event that the primary datacentre goes completely dark where all VMs are lost or there is no internet connectivity an investigation period will be undertaken for 2 hours to determine the cause and decide if a datacentre promotion is required to make the secondary datacentre the primary one. Once this decision has been made the solution has been designed with an RPO of 12 hours and a RTO of 12 Hours 'Optional' Customer Copies of Backups.

8 Business Continuity

The Access Group's full and most up to date business continuity plan can be requested by emailing buyer.enablement@theaccessgroup.com

9 ISO27001 Accreditation

The Access Group holds ISO27001:2022 accreditation across the entire organisation. This independently verified certification demonstrates our commitment to protecting your data. Maintaining this accreditation requires us to demonstrate effective security controls, regular staff training, and documented processes that are tested through independent annual audits.

10 Development Life Cycle

As one of our core products Access Recruitment CRM has a detailed roadmap of improvements driven both by customers and by our own roadmap. Ongoing development against each application is supported by a development plan that has high levels of details for the next 3 months including user stories. Beyond that top line plans are in place by quarter for a further 12 month with a list of additional options waiting to be added.

New functionality is added on a regular basis (usually every month) with all companies benefitting at the same time.

11 Technical Requirements

Access Recruitment CRM runs on any computer device with a browser and Internet connectivity.

Web Browsers

- Microsoft Edge (current version)

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- Firefox (current version)
- Safari (current version)
- Google Chrome (current version)

12 Service Constraints

Maintenance windows as detailed above are minimal with the service so that we use all reasonable efforts to ensure that the SaaS Services are available for 99.70% of each calendar month.

As a true SaaS solution customisation is not available although the product can be configured to meet all standard set up requirements.

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