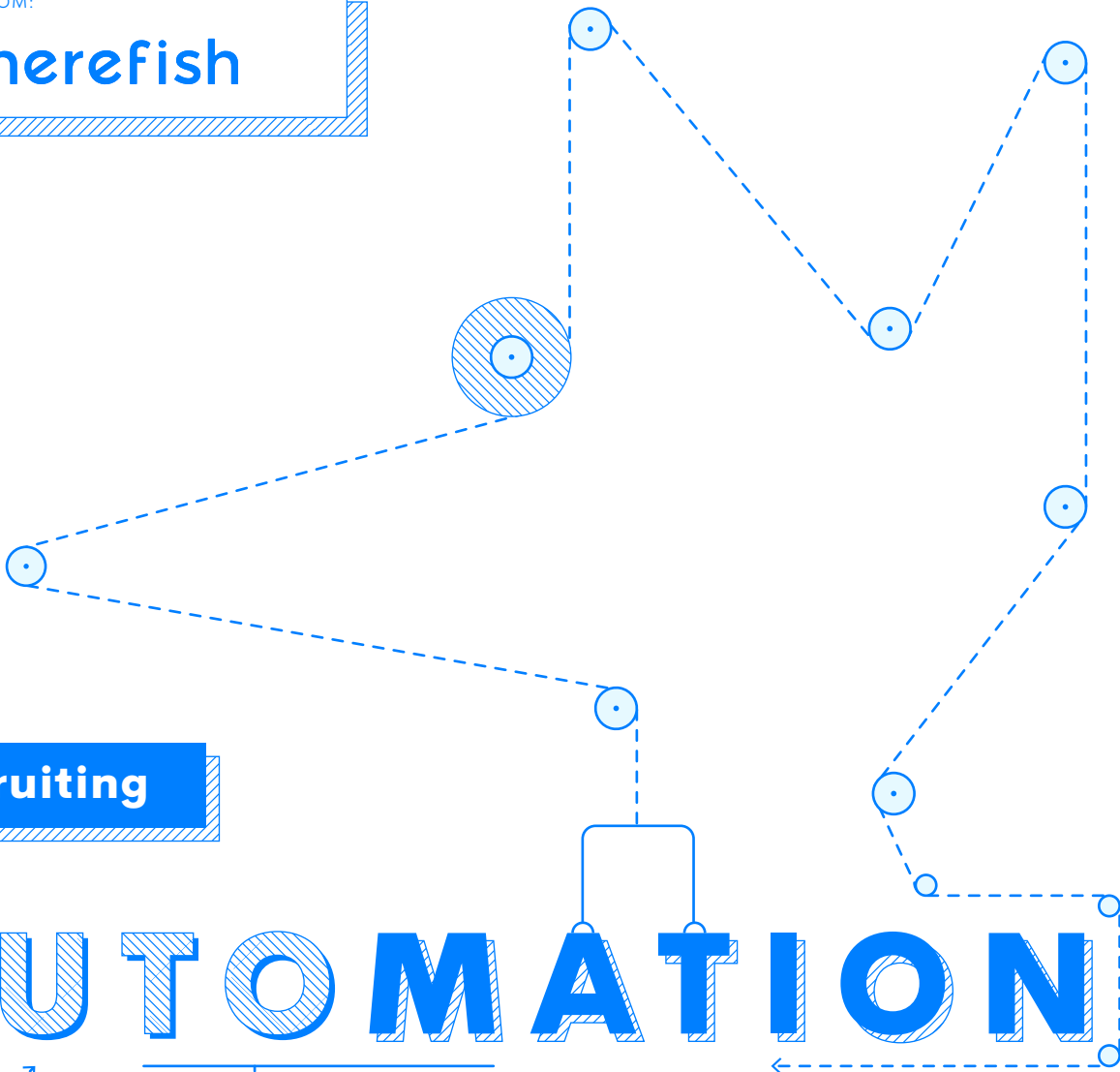


A RESOURCE FROM:



recruiting

AUTOMATION

workbook

This workbook belongs to

ENTER COMPANY NAME

This automation workbook exists to make it easier to plan what your recruiting firm should automate.

Our goal is to help you critically think through your audiences, steps, actions and timing when planning workflows.

These workflows can then be taken from paper or PDF and re-created in Herefish and activated for real-world outcomes.

Happy planning!



Your Automation Goals

How can automation help improve the productivity and communication from your firm?

DIRECTIONS:

GOAL:

PRIORITY:

Follow-up with everyone who applies to our open jobs	<input type="radio"/> LOW	<input type="radio"/> MID	<input checked="" type="radio"/> HIGH
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	<input type="radio"/> LOW	<input type="radio"/> MID	<input type="radio"/> HIGH



Your Recruiting Cycle

Use this section to identify the key stages in your recruiting cycle and what you'd like to accomplish at each of those stages.

EXAMPLE RECRUITING CYCLE STAGES:



EXAMPLE SALES CYCLE STAGES:



Stage

At what point during your recruiting cycle do you want automations to occur?

STAGE:

New applicants

Think of the journey a candidate or sales contact will take when interacting with your firm and then break out each step - these are your stages.

In our example we're looking at 'New Applicants' and then brainstorm what we'd like to automate at that stage.

Things to Automate

What would you like Herefish to do automatically at this stage?

Automation could be communication-based like sending an email to candidates or sending a notification to the record owner. Or you could opt for productivity automations like updating ATS fields or adding notes or tasks.

Our advice: start with simple automations and then expand as new use cases pop up. Take a look at your day-to-day and target the activities that are manual, repetitive or mundane.

THINGS TO AUTOMATE:

Send immediate email to candidate after they apply from their assigned recruiter

Update their ATS status to 'Active'

If the candidate is in our Top Talent list, add task to call on next business day



Your Recruiting Cycle WORKSHEET

Use these worksheets to break-out your specific stages and jot down what you'd like to automate.

STAGE:	STAGE:	STAGE:	STAGE:	STAGE:
THINGS TO AUTOMATE:	THINGS TO AUTOMATE:	THINGS TO AUTOMATE:	THINGS TO AUTOMATE:	THINGS TO AUTOMATE:



Your Recruiting Cycle WORKSHEET

Use these worksheets to break-out your specific stages and jot down what you'd like to automate.

STAGE:	STAGE:	STAGE:	STAGE:	STAGE:
THINGS TO AUTOMATE:	THINGS TO AUTOMATE:	THINGS TO AUTOMATE:	THINGS TO AUTOMATE:	THINGS TO AUTOMATE:



Your Recruiting Cycle WORKSHEET

Use these worksheets to break-out your specific stages and jot down what you'd like to automate.

STAGE:	STAGE:	STAGE:	STAGE:	STAGE:
THINGS TO AUTOMATE:	THINGS TO AUTOMATE:	THINGS TO AUTOMATE:	THINGS TO AUTOMATE:	THINGS TO AUTOMATE:



Anatomy of an Automation Plan

Automation Name & Owner(s)

Give your automation a name. Something descriptive to what it's doing. Also, who's in charge? Having a project owner or owners helps keep your automation projects moving along.

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Audience, due date & stage

Arguably the most important part; who is going to be involved in this automation? Is it candidates or sales contacts? Contractors with no activity in 30 days? Get as granular as needed to make your communication or activities more relevant.

Due date: Things tend to get done when they have a due date...add it.

Stage: Tie this automation back to one of the stages you identified earlier.

Steps, actions & timing

Each step contains a specific action and the time it should occur. Maybe step 1 is sending a welcome email and step 2 updating a candidate status. Get specific and think through the linear flow people in your ATS should take.

Desired outcome(s)

What are you trying to get out of this automation? It could be improving your contractor redeployment rate, reducing daily busywork, increasing response rates...whatever you want to achieve, write it down so you can track it later.

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AUTOMATION NAME: Candidate Re-engagement	OWNER(S): Maggie Marketer
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AUDIENCE: Candidates with no contact history in 6 months Candidates that were created less than 2 years ago Candidates with valid email address	DUE DATE: March 3rd
	STAGE: Pre-hire engagement

STEP	ACTIONS	TIME
1.	Send email - "Welcome to Our talent community" email contains helpful content and a few jobs that match each candidate's profile	Day 1
2.	Send email - "Updating your resume...even when you're at a job you love" call to action to read article along with 3 jobs that match candidate profile	Day 30
3.	Send email - "7 salary negotiation tips" call to action to read article along with 3 jobs that match candidate profile	Day 60
4.	Send survey email - "Expertise request - salary survey" call to action to complete survey	Day 90

DESIRED OUTCOME(S): Improve engagement metrics (open rate, click rate & job views) Drive passive candidates to job seekers Make additional placements from existing ATS candidates



AUTOMATION NAME:	OWNER(S):
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AUDIENCE:	DUE DATE:
	STAGE:

STEP	ACTIONS	TIME

DESIRED OUTCOMES:



AUTOMATION NAME:	OWNER(S):
------------------	-----------

AUDIENCE:	DUE DATE:
	STAGE:

STEP	ACTIONS	TIME

DESIRED OUTCOMES:



AUTOMATION NAME:	OWNER(S):
------------------	-----------

AUDIENCE:	DUE DATE:
	STAGE:

STEP	ACTIONS	TIME

DESIRED OUTCOMES:



Appendix USE CASES

There are hundreds of ways recruiting & staffing firms can leverage automation. Below are a few common use cases to give you inspiration.

New applicants

Send all new applicants a follow-up series directly from the record owner. You can also update ATS status fields. For example change from 'Passive' to 'Active'.

Candidate status updates

Automatically send emails to candidates as they move throughout the recruiting process.

Rejection communication

Candidates don't care they didn't get the job, they care that no one let them know. Improve your candidate experience and automatically send a rejection email along with similar jobs (based on rejection reason).

Interview reminders

Send email or text reminders to candidates, hiring managers, recruiters or account managers for upcoming interviews.

Clean up your data

Quickly find people in your ATS that don't have an email address or phone number and add to list for archiving.

Send email sequence to sales leads

Pre-build a 7 step email/call sequence that gets sent to new sales leads over a period of 21 days.

NPS surveys

Send contractors an NPS survey every 90 days during an assignment.

Post interview survey

Send a survey to hiring manager after scheduled interview date to assess the quality and capture feedback about a client.

Job/page view alert

Send notification email to assigned recruiter/salesperson when a top candidate or sale prospect visits key page on your website.

Gather position credentials

Big for healthcare and LI - start email sequence to candidate 30 days before expiry date for credentials. For expired credentials, update status in ATS to 'Expired Creds' or similar.

New hires

Communicate with new hires by sending position-specific email or text starting 7 days before their start date.

Create 'always updated' lists

Use Herefish to create granular lists of people in your ATS for use in future automations.

Job-based email

Send emails to candidates containing jobs that match their profile at regular intervals.

Update candidate/contact records

Update candidate or company contact records based on activity/no activity or any other searchable criteria.

Add task to ATS

Add a task to call candidate 1 day after their start date to see how the first day went and field any questions.

Automation can save your firm thousands of hours, thousands of dollars, and help drive new revenue from existing ATS data.

So, what will you automate? Let us know by using hashtag #herefishAutomates

