The 4 R's of Automation
in Staffing and Recruiting

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Introduction

You want your team focused on what they are really good at: building the right relationships to make your agency money. But, if your team is losing time doing manual tasks, then **your agency is losing money**.

The key to getting your team's time back is a highly underutilized tool that you likely already have in your arsenal: **automation**.

No matter where you are in your automation journey, this eBook is for you.

In this guide, we will teach you the first four processes your staffing and recruiting firm should automate to increase productivity and, therefore, revenue for your business.

It's all about the 4 R's of Automation

1 *Reengagement*

2 *References*

3 *Referrals*

4 *Redeployment*

Reengagement

As a staffing and recruiting leader, you know that candidates are often as busy as recruiters. They can fall out of touch easily – whether it's because they got a new position or because they are chronic ghosters 👻.

That's what makes reengagement so crucial. Reaching out at regular intervals can bring disengaged candidates back into the fold, remind job searchers of how much you've helped them in the past, and keep you top of mind when it's time to give a friend a referral.

We recommend never letting more than six months lapse without some contact.

And keeping track of reengagement manually for thousands of candidates? It's just not possible.

How to Run a Successful
Reengagement Campaign

1 — Identify Dormant Candidates

Query your ATS to identify candidates who haven't engaged with your recruiting team in the past six months.

2 — Segment Target Lists

Group dormant candidates by skills, experience level, or past clients. This allows you to craft targeted, relevant messages to each segment.

3 — Setup Automated Drip Email Campaign

Set up an automated email drip campaign to reach out to the dormant candidates in batches.

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Reengagement Email Schedule

Email #1

Send an **initial, warm, friendly email** checking in and asking if they are still interested in opportunities. Include open roles that may be a potential fit based on their background.

Email #2

Follow up **three days later** with candidates who did not open Email #1. Mention you are checking in again about potential roles suited to their experience. Use a more urgent, enthusiastic tone to spark their interest.

Email #3

One week later, send a final follow up to non-responsive candidates, urging them to inform you if they are no longer looking or to update their profiles. Let them know that you're eager to connect them with new opportunities.

How to Run a Successful
Reengagement Campaign

4

Set Up Automated Follow-Up Reminders

Set up automated reminders to call those who didn't respond to your email campaign. Discuss new roles and gauge their interest level.

5

Log Reengagement Outreach

Record any candidate responses or profile updates in your ATS so everyone's status stays current.

6

Keep Track of Your Success

Track the success of your campaign. Review email open and response rates to identify any needed improvements.

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References

These days, we don't buy anything or go anywhere without checking up on reviews. When you book a trip to Disneyland, you're all over TripAdvisor and Yelp, checking out which restaurants, hotels, and local attractions are the best – and which ones you'd be best to skip.

References are the Yelp of candidate hiring. References can give your candidates five stars on their skills, talents, traits and workplace demeanor (or let you know which candidates are best to skip).

Just like it's overwhelming to sort through all the reviews when planning that trip to Disney, **manually processing candidate references can be a big drain on your recruiters' time.** That's what makes it a prime process for automation.

Email Cadence for
Requesting References

Email #1

Email **one day after your initial conversation** with candidates, asking them for their references.

Email #2

Send a simple follow-up email **after two days** to those who didn't send you their references.

Email #3

One week later, send a final request for references, emphasizing their importance.

PRO TIP: Have candidates fill out a reference form that syncs their info with your ATS.

Gathering
Reference Information

1   **Create Reference Request Email Template**

Introduce yourself, explain that the candidate listed them as a reference, and request a phone call to discuss the candidate's qualifications.

2   **Create an Automation Rule to Trigger Email**

When candidate status changes to "Interviewed," this rule sends the reference request email to all contacts listed as the candidate's references.

3   **Create a Reference Response Form**

This is a simple template for recruiters to record notes, impressions, and any red flags from reference calls.

4   **Create Reference Check Task Automation**

When reference request is sent, create a "Complete Reference Check" task reminder to accomplish within 7 days of the request date.

5   **Create Candidate Status Automation**

This changes candidate status from "Interviewed" to "Reference Checked" when the above task is marked done.

Tracking and Following Up on
References

Invite references to be in touch if they have any placement needs or to refer other qualified candidates to your agency.

Track Reference Data

Enable reference data to flow into reports and analytics. Key fields could include role and company of reference, date contacted, key takeaways, and overall recommendation.

Automate Your Thank-You Email

Create a reference thank-you email, expressing your appreciation for their time and effort. When the candidate status moves to Hired, automatically send the email to the candidate's references.

Flag Those Red Flags

Configure conditional automation: If the reference check uncovers red flags, send an email notification to the recruiter and automatically change candidate status to "Reassess."

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Referrals

It's one of the easiest ways to pick up new candidates or clients. Yet, most staffing and recruiting professionals don't ask. They either don't have time, forget, or don't want to inconvenience the other person. You guessed it – we're talking about referrals.

Referrals are a great way to grow your candidate pipeline. Plus, they help you keep your existing candidates engaged and invested in your agency. A solid gold reference from a candidate is like doubling the ROI on the time, energy, and money you've invested in sourcing and relationship-building. Plus, **employee-generated referrals tend to perform better at their jobs and stay at organizations longer** than non-referrals. It's a win-win-win.

Good candidates usually know other good candidates. But **generating referrals manually is a non-starter**.

A great referral system will generate multiple leads per existing candidate, which means that your recruiters will quickly become swamped with outreach if you try to forge ahead without proper automation in place.

Generating Referrals

1 **Add a Referral Field in Your ATS**

Use this field to track who has provided referrals. This will allow you to segment your referral outreach campaigns between those who have made referrals and those who are new to your referral program.

2 **Offer a Referral Bonus**

Offer a referral bonus for candidates once their referral is hired. Set up a tracking system in your ATS to ensure referrers get their bonus in a timely manner.

3 **Promote Your Referral Program Far and Wide**

Promote your referral program on your careers site, job postings, email signatures, and social media. Make it easy to refer candidates from anywhere.

4 **Include Referral Reminders in Your Newsletters**

Send an automated monthly email newsletter to all candidates with open positions, new roles, and a call for referrals.

5 **Don't Forget the Phone**

Ask for referrals during phone screens and interviews.

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Automating
Candidate Referrals

Ask for Referrals After Hiring

Two weeks after a candidate is hired, automate a congratulatory email. In this email, so if they have any friends or former colleagues they want to refer.

Tap Top Performers

Identify top performers at client organizations. Ask if they know of anyone who may be a good fit for open requisitions.

Fill Those Hard-to-Fill Roles

Use data from the ATS to identify when roles are difficult to fill. Proactively reach out to past candidates for these roles asking for referrals.

Connect with Unhired Candidates

Set up an automated email to all candidates in the ATS who were not hired three months after last interaction. Thank them for interviewing, let them know you have new openings, and ask for referrals.

Tracking and Following Up on
Referrals

Automate Your Thank-You Emails

Create a thank-you email to be sent automatically whenever a referred candidate is hired.

Track Referral Data

Track your referral statistics in your ATS to gauge the success of all your outreach campaigns.

Prioritize the Most Effective Channels

Pay particular attention to what outreach methods tend to be the most successful in generating placeable referrals.

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Redeployment

Imagine that the first time you had success learning a new skill, you moved on to something new. So, the first time you mastered the F-chord on the guitar, you picked up the clarinet. The first time you landed an Ollie, you put down your snowboard and laced up some rollerblades. Not only would you never develop the kind of deeper mastery that comes with long-term practice, you'd also continually waste all the time and energy you put into starting your new hobby.

Sourcing top candidates without having a redeployment strategy in place is just as wasteful. You put good time, money, and energy into building relationships with these candidates, and it would be a shame if every single one was a one-off placement. You'd miss out on the ability to build long-term relationships with candidates, and you would be running an inefficient agency. Without building on previous work, you would always be a newbie with your candidates.

Automation can help you superpower your redeployment efforts. The automated outreach campaign on the following pages helps you stay in constant contact with your candidates and ensure that you're team is first in line when it comes to placing them in their next assignment.

Redeploying Candidates

Before Their Assignments End

1 **Six Weeks Out**

Check in with candidates and ask how their assignment is going. Start a conversation about their preferences for next steps. Get a sense of their timing or roles they want to explore.

2 **Four Weeks Out**

Follow up with 2–3 potential job opportunities that align with their timing and interests. This shows you're proactively lining up options. Ask for their feedback on how closely the position match their needs.

3 **Two Weeks Out**

Call to synthesize any applications or interviews that are underway. Brainstorm new prospects based on any emerging priorities. Send a few fresh openings.

4 **One Week Out**

Confirm their last day. Nail down a time to meet very soon after their assignment ends to rev up the search. Convey your commitment to identifying the ideal next move.

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Redeploying Candidates

Before Their Assignments End

5 **Last Day**

Automate an email to greet them on their last day. Congratulate them for a job well-done. Reiterate your availability for an in-person meeting to kickoff the next search immediately after.

6 **Day After**

Meet to outline priorities, refine preferences, and craft a redeployment plan. Focus your energy here to restart momentum quickly.

7 **Three Days After**

Share 2-3 opportunities curated for the candidate's priorities. Follow any hot leads and get their input on how closely they match their needs.

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Putting It All Together

Running mission-critical processes like reengagement, references, referrals, and redeployment manually instead of automating won't work in today's staffing and recruitment world. It's a bit like biking to a meeting you're late for instead of taking a car.

These days, everyone in the industry is clamoring for candidate attention. Speed and impeccable follow-through are two ways to stand out from the pack. Further, automation allows your team to offload the time-drains so they have more energy for the relationship-building that fuels your organization.

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About Crelate

This guide to automation is provided by Crelate. Crelate offers modern, flexible, and full–featured recruiting solutions for talent focused businesses. We're committed to helping recruiters align the right talent with the right opportunity at the right time.

Visit get.**crelate.com/omni** to learn more, schedule a demo, or activate a free trial.