Recruit CRM — Customer Success Associate (CSA) Assessment

The goal of this project to assess 2 things:

1. Your written communication skills.
2. Your on-screen presence - the ability to record an effective 1-3 minute Loom feature while sounding excited & happy.

Task A: Product Pitch Simulation (CSA-Focused Video)

As a CSA, you often need to explain product value quickly and clearly to different types of users — from recruiters to hiring managers. In this task, you'll record a 2-3 **min pitch video** explaining how a specific **Recruit CRM feature** solves a **real customer problem**.

Note: Use Loom and explain the relevant feature that is solving the purpose for the selected persona. The video must show your face along with the shared screen.

Here is the sample - LINK (view to understand how to record)

Instructions:

You'll receive **3 user personas** — choose **1** persona to prepare for.

Sample Personas:

- **Junior Recruiter** struggling with tracking follow-ups
- **Agency Manager** managing remote recruiters and async updates
- **Talent Acquisition Specialist** needs to check real-time status/progress of all their candidates and jobs that they are working on

Instructions:

Once you have picked any one persona, you record a video (using Loom) of how you have resolved the challenge where you would need to explain:

- Which feature of RecruitCRM is useful to that persona

- How it is used and helpful to make their job easier
- Why that particular feature matters
- Try to keep it simple
- End with a friendly note

Note: The video must show your face along with the shared screen explaining the feature in Recruit CRM !

Submission Format: Loom link or video/audio upload (max 90 seconds)

Task B

(Part A) : Customer Scenario Email Response + AI Curiosity

Instructions (Written Task):

Choose one of the following real-world customer scenarios and respond via email (max 250 words)

Option 1: Escalation Handling

A long-time customer is frustrated that a bug hasn't been fixed for a month.
Your email should:

- Acknowledge their frustration
- Provide context or a workaround (if any)
- Reassure them about next steps

Option 2: Feature Clarification

A client misunderstood the platform's capabilities and expected a feature that doesn't exist.
Your email should:

- Clarify the misunderstanding respectfully

- Suggest an alternate workflow

- Maintain a proactive, friendly tone

Option 3: Onboarding Follow-Up

You onboarded a new user last week.

Your email should:

- Check if they're facing any blockers

- Suggest a tip or hidden feature based on their role

- Offer to help in a friendly, proactive tone

Part B: AI Curiosity

At the end of your email response, answer **one** of the following (in 2–3 sentences):

1. What's one thing you're curious about when it comes to AI in customer service?

<div align="center">OR</div>

2. Name a tool or feature (like ChatGPT, Gmail Smart Reply, etc.) that uses AI. What do you like/dislike about it?

<div align="center">OR</div>

3. If Recruit CRM gave you an "AI buddy" on Day 1, what tasks would you ask it to help with?

Submission Format: Word, Google Doc, or PDF (max 250 words total incl. AI answer)

Kindly submit your assignment - LINK

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NOTE: For any queries reach out to sarvesh@recruitcrm.io