**Recruiter Case Study**

**Sourcing and recruiting**

**1A. Sample Outreach Message (Inbound Applicant)**

Subject Line - Clipboard Health | Senior Product Manager | First Step Kickoff

“Hi {CANDIDATE NAME},

Thank you for your interest in Clipboard Health. We’re excited to move you to the first step in our hiring process, which is a case study. The case is very similar to the type of problems we encounter in our marketplace and we hope you enjoy working on it! The case prompt can be found here: <https://creatingvalue.substack.com/p/real-problems-we-tackle-pricing-level>  
  
Once you’ve completed the case, please submit your response as a written document via the link below. Be sure to include any additional documents that track your thought process such as notes, models, or any other calculations. We don’t just factor in the results, but we also want to see the journey that led you to your destination.  
  
Although there is no deadline for the case, we value speed at Clipboard Health and look forward to hearing from you soon!  
  
Best,  
  
Antony Vo”

**1B. Sample Outreach Message (Outbound Applicant, Sourced through LinkedIn)**

Subject Line – Clipboard Health | Looking for a Senior Product Manager

“Hi {CANDIDATE NAME},

I hope your week is going well! We are currently hiring a Senior Product Manager and came across your profile. This position is 100% remote. You would be joining our PM team and working with a fast-growing organization. The full job description is listed here for your reference: https://docs.google.com/document/d/1L3ECZVkOHZb4FARg2hT8yQVjkyaUwR8O-ghH-BuS\_SE/edit  
  
For context, we are a post-series C tech startup that is revolutionizing the market for healthcare talent. There has never been a more exciting time to join our growing team and help us serve various healthcare professionals and organizations. If you or anyone you know might be interested in this role, please feel free to reach me at 925-381-7751 or [antonyvo12@gmail.com](mailto:antonyvo12@gmail.com). I look forward to connecting with you!  
  
Best,  
  
Antony Vo”

-Note: I included both an inbound and outbound message for candidates who apply directly and for those I would be sourcing for. The inbound message would be an email template I add directly to Greenhouse (or any ATS) on the backend to optimize our time and process. This format is very similar to the ones used for reaching out to candidates who qualify for the case study with Clipboard Health.   
  
The outbound message would also be a template, but I would source them on LinkedIn using Boolean string searches. Here, I included parts of the job description and gave some insight about the company because it is a cold outreach email. I use a very similar template at my current healthcare organization to source and add them to a prospect pool on Greenhouse. By having two mediums for candidates, we can generate and nurture a healthy pipeline.

2. In this situation, I would want to reach out and connect with the hiring manager and the interviewers. By seeing what exactly the hiring manager is looking for, I can then express my concerns and give feedback in a respectful manner. Firstly, because the hiring manager has informed me that we are going to add another interviewer, I will likely add a stage on our ATS Greenhouse so that we have an additional scorecard to fill out. Next, I will connect with the hiring manager via MS Teams/Slack/Zoom for a 1-on-1 meeting to determine what they are looking for in their new hire. I would then speak with the other two interviewers separately to see which candidates they have moved forward with and those who have been rejected, respectively. This way, I can get an even better understanding of what the team is looking for so I can adjust the job positing and description accordingly.

-Note: My reasoning for implementing these steps is very straightforward. I believe that open communication between the recruiters and hiring managers can lead to getting a very successful hire who could be the perfect fit for the role. When I stated that I would give some feedback, I would respectfully bring up data points to back my claims. After connecting with the hiring team, I would say, “We know that in the previous fiscal quarters that adding another step to the hiring process will cause delays in the pipeline. If there are delays in the pipeline, some candidates may withdraw from the process after having accepted other job offers. Based on these previous metrics from Greenhouse reports and PowerBI, I would highly encourage the team to reconsider adding another step into the hiring process. However, if you would like to proceed with adding another interviewer, I would be more than happy to reach back out to the candidates to let them know.” My policy is to follow up with stakeholders within 48-72 hours.

**Process Design and Improvements**

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1. Based on the data points provided, it appears that there could be various changes made to improve the efficiency of the hiring process. Here would be my SMART plan:

Specific (S): Reduce the time-to-hire from 120 days to 50 days by streamlining the hiring process with maximum efficiency. Our goal is to ensure a great candidate experience while keeping consistent communication and integrity with the hiring team.

Measurable (M): The current average time-to-hire is 120 days, and we want to reduce that number to 50.

Achievable (A): Identify bottlenecks in the existing hiring process. Based on the data, we see that the candidate is placed and held for far too long at the Take Home Test, Phone Interview, WBD Case Study, and Executive Review stages. These bottlenecks take weeks or even months which cause delays in the hiring process. I would want to set expectations very early on and give candidates and hiring managers a deadline to complete their given tasks in that hiring process. This could mean closing out the submission dropbox on Greenhouse within 48-72 hours, which ensures candidate integrity and communication. This can also mean setting reminders on Greenhouse for the hiring team so that they can submit their scorecards within 48 hours after the interview has been completed. We want to move along the candidates that are responsive and eager to work with our company at Clipboard Health. If we have 10000 applicants and only about 10 are going to make it to the Offer stage, we need to re-evaluate how the candidates feel after being delayed in the pipeline for weeks or even months on end. With these changes being implemented, I can see the candidates in the:   
  
Take Home Test stage being moved in 3 days instead of 64 (-61 days)

Phone Interview stage being moved in 2 days instead of 12 (-10 days)

WBD Case stage being moved in 3 days instead of 14 (-11 days)  
Executive Review stage being moved in 3 days instead of 7 (-4 days)

This means that we reduce the time to hire by 86 days, with a total reduction in time-to-hire from 120 days to 34 days.

Relevant (R): We want to make sure that the plan aligns with the organizations objectives, like improving and streamlining day-to-day operations and attracting talent in a fast and timely manner.

Time-Bound (T): I would want to change this recruiting process as quickly as possible, and my target would be 2 months. For the first week, we will focus on identifying bottlenecks and gather additional data points. In the second week, we will implement the changes listed above (reducing the time candidates have to submit a document, reducing the time hiring managers and interviewers need to submit a scorecard). Just within the third and fourth week, we can re-introduce the talent pool with sourced or incoming applicants. In the upcoming month, we can continue to gather data from candidates and post-interview feedback from hiring managers to leverage insights with the new hiring process. Any changes can be made accordingly based on the effectiveness of each implementation.

-Note: I have already looked into key data points via Greenhouse reporting and Microsoft Excel spreadsheets in my current role as a Lead Recruiter, which allows me to come up with and implement this plan very quickly. I have done it before in my current healthcare organization and would be willing to adapt to revisions to be successful in my new role. I know that I reduced the time to hire from 120 days to 34 days, which is significant, but I do want to factor in unexpected delays and setbacks which may be out of our control. This way, we have a 16 day buffer window.

2. I believe that building and establishing a robust feedback mechanism would enable us to keep an open line of communication for candidates and hiring managers.   
  
Firstly, I would send out a short survey to all candidates who have completed an interview which would include questions about communication, clarifying expectations, and satisfaction with their candidate experience. I would reassure the candidates that their feedback is entirely used to improve our hiring process and it would not impact our hiring decisions.   
  
Secondly, I would have to communicate openly with hiring managers. By providing them with a clear overview of the hiring process that includes key stage changes, timelines, and responsibilities, I can ensure a consistent level of communication. I can do all of this by setting up regular check-ins with hiring managers to discuss the hiring process, gather post-interview feedback, and identify areas for improvement. I have done this before in my current role as a lead Talent Acquisition Recruiter, where I’m able to connect with various departments including HR, IT, Facilities, and Workforce Development in a timely manner and to meet their needs. During this time, I would want to actively communicate to them about submitting scorecards and moving candidates to (X) stage in our ATS so we can prevent delays in the hiring process.

Lastly, I would convert all of this feedback into actionable insights. I will continue to prioritize improvements that have the most impact on the candidate experience and creating a more efficient process. This can mean utilizing a scheduling software such as Calendly, and integrating it into Greenhouse. This could also mean sending out email templates to candidates with the hiring managers cc’d in order to keep them in the loop. Based on the feedback we get from hiring managers and candidates, I’m open to refining the hiring process and implementing changes gradually to measure their effectiveness over a period of time.

-Note: I would love to speak with candidates on the phone after every stage of the interview, but in a high-volume recruiting setting, especially from what I’m used to, time would not allow for it. Therefore, I will continuously keep open communication for stakeholders via different mediums, such as emails, Slack, or Microsoft Teams.

**Data Analysis**

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1a. Based on the data here, I would have to prioritize the Strategy and Operations role. This is because the number of applicants is very high (over 1000), yet there has been no one hired even after an offer is extended. I would want to fill that requisition as soon as possible, because the hiring team may need someone in that seat. As for my second priority, I would want to focus on the VP, Corporate Controller. It seems that the number of applicants for that role is extremely low, sitting at around 85, so I would want to optimize my time to source and find the right candidates. In addition to that, They have only hired one person for that position. Lastly, I would focus on the Senior Product Manager role. With 973 applicants and 2 people hired, there is a healthy pipeline that I could work with.

However, I would not just shift focus into one of these three roles. I will continue to prioritize hiring for all of them and reach out to the hiring managers for each. This way, I can connect with them to ask for timelines and feedback. I would ask several questions for myself and the different teams in order to help me determine priority:  
  
For me:

Which role has the potential to make the most immediate impact on the company’s goals or projects?

Which role aligns most closely with the company’s priorities?

Are there any pain points that can be alleviated by onboarding another team member?

Is one of these roles more difficult to fill due to the job market?

For hiring managers and leadership:

How soon do you want this role filled?

Is this role needed to support urgent projects?

Do we have the necessary interviewers available for this role?

Do we anticipate any changes in our business or organization that could impact the importance of these three roles?

-Note: I’m open to changing and adapting my recruiting process to adapt for these changes within different departments depending on their needs. This is because one process might work for one hiring manager in the Product Department, but might not work for one in the Finance Department. Again, as a talent acquisition lead, I partner with various key stakeholders in order to accommodate and support the company as best as possible. Priorities can shift very quickly based on the Clipboard Health’s needs and external factors. I’m comfortable pivoting my strategies based on newfound information and market shifts. In a startup environment that is very fast-paced, I’m open to trying new methods to stay adaptable.

1b. I would have to reach out to 425 candidates to get 2 offers for the VP, Corporate Controller role.   
  
-Note: 40% would mean that if I reach out to 425 candidates I’m able to connect with and screen 170 individuals, which is 85 doubled. With a ratio of 85:1 for Recruiter Calls to Offer, this would mean I can make 2 offers.