

Automated Interview Workflows – SOP

Owner: Diane Wilkinson
Context: US Recruiting – Greenhouse ATS
Purpose: SOP Automation Playbook

I. Scope & Goals

- Reduce no-shows & time spent in stages
- Standardize candidate/manager communications and expectations
- Improve feedback compliance and pass through
- Status transparency

KPIs: No-show rate | Time spent in stages | Scorecards on-time | Candidate CSAT | Template Usage | Response Rates

Candidate Journey - Operating Model (Swimlanes)

	Sourcing	Initial Screen	Technical /HM Interview	Final Interview	Offer	Onboarding
Recruiter	<ul style="list-style-type: none">- 3 touch outreach- HM Intake- Referral replies	<ul style="list-style-type: none">- Advance ATS stage- Conduct Initial Screen- Scorecard	<ul style="list-style-type: none">- HM Feedback- Advance ATS Stage / Reject	<ul style="list-style-type: none">- Coordinate Panel- Advance ATS Stage / Reject	<ul style="list-style-type: none">- Coordinate & send offer / consult- Keep warm if pending- Rejection calls- ATS update	<ul style="list-style-type: none">- Intros / next steps
Hiring Manager	<ul style="list-style-type: none">- Define must-haves- Share referrals	-	<ul style="list-style-type: none">- Conduct Interview- Scorecard < 24h- Recruiter Feedback	<ul style="list-style-type: none">- Attend Panel Interview- Scorecard < 24h	<ul style="list-style-type: none">- Close candidate call- Team intro plan	<ul style="list-style-type: none">- 30/60/90 plan- Equipment & setup requests
Candidate	-	<ul style="list-style-type: none">- Book / Reschedule- Attend screen	<ul style="list-style-type: none">- Prep- Attend Interview	<ul style="list-style-type: none">- Submit Availability- Attend Panel Interview	<ul style="list-style-type: none">- Review & Respond	<ul style="list-style-type: none">- Complete docs
ATS System	<ul style="list-style-type: none">- Live Postings- Source Capture	<ul style="list-style-type: none">- Booking requests & timed nudges- Confirmations- Reminders- 2h Follow up- Delay Notices	<ul style="list-style-type: none">- Booking requests- Confirmations- Reminders- 2h Follow up- Delay Notices- Scorecard nudges	<ul style="list-style-type: none">- Confirmations- Reminders- 2h Follow up- Delay Notices- Scorecard escalations	<ul style="list-style-type: none">- Approvals- Offer Template- E-sign flow- Background check	<ul style="list-style-type: none">- Trigger ONB #1/#2- Create onboarding tasks

II. Roles & Owners

Recruiter (R): owns candidate comms; monitors automations; nudges

Coordinator (C): schedules; calendar logistics & reminders

Hiring Manager (HM): completes scorecards; attends feedback huddles

Panelists (P): complete scorecards within SLA

GH Admin (A): maintains templates, triggers, routing, aliases

Global SLAs: Candidate reply ≤24h; HM scorecards ≤24h post-interview; panel scorecards ≤24h; recruiter follow-up ≤24h

III. Global Rules (apply to all automations)

Time zone: send in candidate's time zone; show both candidate + host times

Reschedule/Cancel: include self-service link and coordinator alias

Accessibility: ask for accommodations in every invite; include phone backup

Privacy: no comp or sensitive data in calendar/body; include consent where applicable

Brand: consistent subject tags — [Company] [Role] [Stage]

IV. Event Matrix – Triggers → Actions → Templates

Tables map to stages with exact timing, recipients, and template IDs from §7.

A) Scheduling & Availability

#	Trigger	When	Recipient(s)	Action
S1	Stage Change: Initial Screen	Immediately	Candidate	Send: [SCHED_Availability_Initial]
S2	No Reply	+2 Days	Candidate	Send: [SCHED_Availability_Nudge]
S3	No Reply	+4 Days	Recruiter	Send: [HT_SCHED_Alert]
S4	Stage Change: Technical Interview	Immediately	Candidate	Send: [SCHED_Availability_Tech]
S5	Event Booked: Technical Interview	Immediately	Candidate	Send: [SCHED_Availability_Tech_Prep]
S6	Stage Change: Final Interview	Immediately	Candidate	Send: [SCHED_Availability_Final]
S7	Event Booked: Final Interview	Immediately	Candidate	Send: [SCHED_Availability_Final_Prep]

B) Initial Interview

#	Trigger	When	Recipient(s)	Action
I1	Event Booked: Initial Screen	Immediately	Candidate	Send: [CONF_Initial_Interview]
I2	Time-based: Reminder	-24h before event	Candidate	Send: [REM_Initial_Interview]
I3	Time-based: Follow up	+2h after event	Candidate	Send: [COMMS_Initial_FollowUp]
I4	Delayed Decision	+7d / +14d / +21d	Candidate	Send: [COMMS_Update_#1-3]
I5	Stage Change: Rejected	Immediately	Candidate	Send: [REJ_Initial]

C) Technical Interview

#	Trigger	When	Recipient(s)	Action
T1	Event Booked: Technical Interview	Immediately	Candidate	Send: [CONF_Tech_Interview]
T2	Time-based: Reminder	-24h before event	Candidate	Send: [REM_Tech_Interview]
T3	Time-based: Follow up	+2h after event	Candidate	Send: [COMMS_Tech_FollowUp]
T4	Time-based: Reminder	-24h before event	Interviewer	Send: [HT_REM_Tech_Interview]
T5	Time-based: Scorecard due	+2h after event	Interviewer	Send: [HT_REM_Scorecard_Nudge]
T6	Time-based: Scorecard due	+24h after event	Interviewer	Send: [HT_REM_Scorecard_Nudge]
T7	Delayed Decision	+7d / +14d / +21d	Candidate	Send: [COMMS_Update_#1-3]
T8	Stage Change: Rejected	Immediately	Candidate	Send: [REJ_Technical]

D) Final Interview

#	Trigger	When	Recipient(s)	Action
F1	Event Booked: Final Interview	Immediately	Candidate	Send: [CONF_Final_Interview]
F2	Time-based: Reminder	-24h before event	Candidate	Send: [REM_Final_Interview]
F3	Time-based: Follow up	+2h after event	Candidate	Send: [COMMS_Final_FollowUp]
F4	Time-based: Reminder	-24h before event	Interviewers	Send: [HT_REM_Final_Interview]
F5	Time-based: Scorecard due	+2h after event	Interviewers	Send: [HT_REM_Scorecard_Nudge]
F6	Time-based: Scorecard due	+24h after event	Interviewers	Send: [HT_REM_Scorecard_Nudge]
F7	Delayed Decision	+7d / +14d / +21d	Candidate	Send: [COMMS_Update_#1-3]
F8	Stage Change: Rejected	Immediately	Candidate	Send: [REJ_Final]

E) Offer

#	Trigger	When	Recipient(s)	Action
O1	Offer Approved	Immediately	Candidate	Send: [OFFER_Extend]
O2	Offer Delayed	+3d / +7d	Candidate	Send: [COMMS_Update_O]
O3	Offer Not Approved	Immediately	Recruiter	Send: [HT_Alert]
O4	Offer Not Accepted	Immediately	Candidate	Send: [COMMS_Offer_Declined]

F) Onboarding

#	Trigger	When	Recipient(s)	Action
N1	Offer Accepted	Immediately	New Hire	Send: [ONB_What2Expect]
N2	Time-based: Pre-start	-2w before start	New Hire	Send: [ONB_Intros]

V. Scorecard Compliance Flow (all interview types)

+2h post-interview: Auto-nudge with direct link

+24h: Due notice; CC recruiter; add GH task

+48h: Escalate to HM + recruiting lead

VI. Reporting & Dashboards

No-show rate by stage

Time Initial Screen → Manager Interview median

Scorecards on-time (% within 24h)

Pass-through Screen → Panel; Panel → Offer

Template adoption (% automated vs. ad-hoc emails)

Recruitment Update usage (delays covered)

VII. Email/Task Template Library (IDs)

Scheduling (SCHED_*)

[SCHED_Availability_Initial] — initial interview scheduling

[SCHED_Availability_Nudge] — follow-up after 2d no reply

[SCHED_Availability_Tech]

[SCHED_Availability_Tech_Prep]

[SCHED_Availability_Final] — final interview scheduling

[SCHED_Availability_Final_Prep]

Confirmations (CONF_*)

[CONF_Initial_Interview] — initial phone screen confirmation

[CONF_Tech_Interview] — technical / hiring manager interview confirmation

[CONF_Final_Interview] — final interview confirmation

Reminders (REM_*)

[REM_Interview_24h] — 24-hour reminder

[REM_Scorecard_2h] / [REM_Scorecard_24h] / [REM_Scorecard_48h]

Comms (COMMS_*)

[COMMS_Blank_Note] — ad-hoc candidate comms

[COMMS_Recruitment_Update_#1–#3] — keep-warm cadence for delays

[COMMS_Resignation_Ack] — candidate withdrawal acknowledgment

Regret (REJ_*)

[REJ_Application] — after application review

[REJ_Position_Filled_Not_Interviewed] — role closed pre-screen

[REJ_Position_Filled_Interviewed] — role closed post-interview

[REJ_1on1_Stages] — after recruiter/HM interviews

[REJ_Final] — after panel

Offer & Onboarding (OFFER_, ONB_)

[OFFER_Extend] — extend offer to candidate

[ONB_WhatToExpect] — post-acceptance #1

[ONB_Intros] — post-acceptance #2 (introductions & next steps)

Token legend: {JOB_NAME}, {CANDIDATE_NAME}, {CANDIDATE_FIRST_NAME},
{CANDIDATE_EMAIL}, {INTERVIEW_NAME}, {SENDER_EMAIL},

VIII. Greenhouse Configuration Notes

Configure email templates, reminders, and time-based triggers in your ATS; lock templates and send from a single shared alias.

IX. Change Management

Train 60+ HMs and all recruiters on new templates, SLAs, and Recruitment Updates cadence

Weekly review for first 4 weeks; monthly thereafter
