



# Candidate Journey

Communications, Automations, Workflows


# Touchpoints on the Candidate Journey



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# Candidate Touchpoint Stages





# Application / Sourcing Stage



# Recruiting Passive Candidates

## = First InMail Outreach

Salary Range → RESPONSE RATE

SUBJECT: IC Sales Director \$140-170K base // \$275-350K+ OTE Uncapped

Hi {firstName},

Unique Differentiator = → **GROWTH**

Call to Action

Solves Relevancy Issue

We are set to triple in size in the next year and I am setting up calls this week for Sales Director opportunities on both my Enterprise Brand-Direct Sales team and brand-new Agency Sales team that I am really excited about, and your experience is exactly what my hiring manager asked for.

Unique Differentiator = → **Perks**

It is a company I really believe in! +they sent me a walking desk for my home office! - I guess their tech is cool too;) (AI @220K pps vs. competitors @80pps)

Call to Action

Unique Differentiator = → **TECH**

Would you be open to chat about how our company beat out Sharethrough, AdTheorant, Xandr, Cognitiv and others for 2022's Best Overall Programmatic (buy-side) solution award, and how we're staying ahead of the cookie crumb?

{jobPostLink}

Call to Action + trackable link

Unique Differentiator = → **AWARD** + Competitor Name Drop in lieu of Co. Name Recognition

Diane Wilkinson AdTech Talent Acquisition @Tech Company  
Dreamweaver | Late-Stage Cancer Survivor | Workforce Enthusiast

Unique Differentiator: Diversity, Stands Out, Memorable, Passion @Work, Branding = Easier to connect if perceived as unique or interesting to talk to

Unique Differentiator = → **hot industry topic**

### NEXT:

- = Add automated reminder to follow up in 2 weeks if no response
- = Move Candidate Profile in Project to "CONTACTED"



# Recruiting Passive Candidates

## = Second InMail Outreach

SUBJECT: Following up

Personalization = indicates previous contact

Hi {firstName},

Only Profiles = "Open to Work" - All Others = [OMIT]

I wanted to follow up on my previous message [since your profile is listed as "Open to Work" and] I really do think my hiring manager will be excited about your background.

Would you be open to chat about how [Company Name] beat out Sharethrough, AdTheorant, Xandr, Cognitiv and others for 2022's Best Overall Programmatic (buy-side) solution award, and how we're staying ahead of the cookie crumbs?

IC Sales Director \$140-170K base // \$275-350K+ OTE Uncapped

{jobPostLink}

Links to job associated with project you are working in + displays full URL  
If job is closed after InMail is sent, link = "No Longer Accepting Applications"

Diane Wilkinson AdTech Talent Acquisition @Tech Company  
Dreamweaver | Late-Stage Cancer Survivor | Workforce Enthusiast

NEXT:

= Automated follow up set for 2 weeks if no response

NOTE: Using {firstName} variable can backfire by showing mass outreach indicators, when candidates include middle initials, middle names, or characters. You may wish to remove the first line greeting, or when messaging one by one, name format should be checked before sending. **The goal is to come across as personalized & memorable as possible.**



# Recruiting Passive Candidates

## = Third InMail Outreach

SUBJECT: Following up

Hi {firstName},

Only Profiles = "Open to Work" - All Others = [OMIT]

I wanted to follow up one last time as [your profile is listed as "Open to Work" and] I really do think my hiring manager will be excited about your background and I have a few time slots left to set up calls.

Call to Action

IC Sales Director \$140-170K base // \$275-350K+ OTE Uncapped: {jobPostLink}

Would you be open to chat?

Please feel free to select a time directly: [Calendar URL]



View my availability:

Diane's calendar

(A link will be attached when sent)

(1) External calendar links display full URL  
(2) If using **LinkedIn Scheduler** Link, it will expire in 1, 2 or 3 weeks & durations are limited to 15 min., 30 min., or 1 hour

Hope to hear from you and happy job hunting!

Diane Wilkinson AdTech Talent Acquisition @Tech Company  
Dreamweaver | Late-Stage Cancer Survivor | Workforce Enthusiast

NEXT:

= Candidate Profile in Project automatically moved to "ARCHIVED" if no response

NOTE: "Archived" Candidates who reply to the third InMail will automatically be moved to "REPLIED"





# Recruiting Passive Candidates

## InMail Response = Accepted: Interested

I am happy to set something up to chat. Please use this link to select a time that works for you: [calendar booking link]

Looking forward to it!

Best,

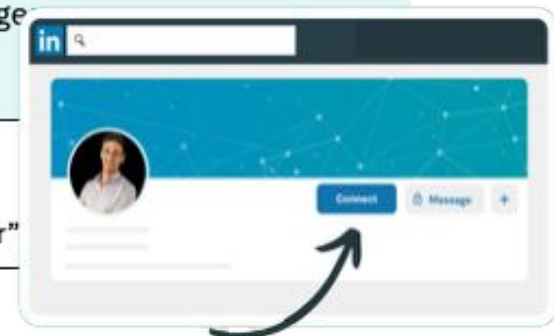
- = Automated workflow will follow up if not scheduled [3-day default]
- = Added to ATS +tag "newsletter"

## InMail Response = Accepted: Future Interest

We are growing fast and anticipate having similar roles open in the future, so I am happy to stay connected and update you on new opportunities. I encourage you to [follow our company](#), keep an eye on our [careers page](#), and please don't hesitate to reach out if anything changes.

Best,

- = Add automated follow up [3-month default]
- = Send LinkedIn invite to connect
- = Added to ATS +tag "future contact" +tag "newsletter"







# Recruiting Passive Candidates

## InMail Response = Accepted: **Not Interested**

Thank you for letting me know and please don't hesitate to reach out if anything changes.

Best,

= Send LinkedIn invite to connect

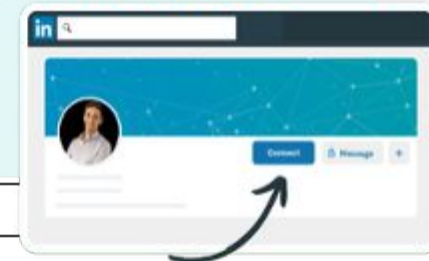


## InMail Response = Declined: **Not Interested**

Thank you for letting me know and please don't hesitate to reach out if anything changes.

Best,

= Send LinkedIn invite to connect



## InMail Response = Declined: **No Message**

Only InMails that are Accepted or Declined **WITH** a message may be replied to. InMails that are Declined **WITHOUT** a message do not allow further messaging

= **NO FURTHER ACTION**

# Referrals

## Inbound Referral: **message to Referrer**

Thank you so much for your referral! They are one of our biggest compliments, so we do our best to take good care of them.

Due to privacy concerns, we are unable to provide status updates, but we encourage you to reach out to your referral contact for information.

Thanks again. It is very much appreciated!

Best,

## Inbound Referral: **message to Referred**

[Referrer Name] referred you for the [Job Title] position at [Company Name]. Your experience is impressive, and we would like to invite you to schedule a call with us to explore the opportunity in detail.

Please review the [job description] and use this link to select a time that works for you: [calendar booking link]

Thanks, and looking forward to connecting!

Best,

# Applications

## Inbound Applicant: **NOT** Moving Forward

Your application for [job-title] at [job-company-name]

Hi [First Name]

Thank you for your interest in joining our company. We wanted to let you know that although your resume was very competitive, our hiring team did not select it for further consideration.

We wish you all the best in your professional career and hope we will have the chance to stay in touch for the future.

= Updated ATS

The background of the image is a dark, atmospheric landscape. It features silhouetted mountains in the distance and a forested ridge in the foreground. The lighting is low, creating a moody and mysterious atmosphere. The text "Initial Screen" is overlaid on the left side of the image in a large, white, sans-serif font.

# Initial Screen

# Initial Screening

## Links:

- =Job Description
- =[\[Company Name\] Blog](#)
- =[\[Company Name\] Careers Page](#)
- =Raise the Bar Video
- =Job Description
- =Google Meet Link
- =Rescheduling Link

## Booked = Confirmation [Immediate @Booking]

Hi [First Name],

We are looking forward to chatting with you on [Event Date] at [Event Time] about the [\[Job Title\]](#) position at [Company Name]. If anything should come up, please use the links provided to cancel or reschedule your call.

In the meantime, we invite you to check out our [Blog](#), and keep an eye on our [Careers Page](#) to learn more about How to [Raise the Bar](#) with us!

Best,

- = Add to ATS if not already entered
- = Set automated workflows
  - ✓ [1] Reminder 24 Hours Before RPS
  - ✓ [2] Follow up email(s) 1 Hour After RPS

## Booked = Reminder [24 hours Before]

Hi [First Name],

This is a friendly reminder that your call with [Recruiter] from [Company Name] regarding the [\[Job Title\]](#) position is at [event\_time] on [event\_date].

[Google Meet link]

If this time no longer works for you, please use the links provided to reschedule, otherwise we are looking forward to connecting tomorrow!

Best,  
The [Company Name] Talent Team

- = Review & Prep for RPS



# Initial Screening

## Links:

Job Description  
[Company Name] Blog  
[Company Name] LinkedIn Company Page  
[Company Name] Careers Page  
Raise the Bar Video  
Job Application

## Attachments:

Careers @[Company Name] One Pager  
The Interview Process

## Follow Up [1 Hour After Initial Screen Complete]

Hi [First Name],

Thank you so much for your time today and your interest in the [\[Job Title\]](#) position at [Company Name]. It was a pleasure speaking with you and learning more about your career and experiences.

### What's Next?

**[ACTION REQUIRED]** As we adhere to strict data protection guidelines, we ask that you provide us with consent to process your information and that you are authorized to work in the United States. Please follow this [link](#) to grant permissions.

Your [Company Name] recruiter will be entering information from your call and submitting it to our hiring managers for review. If approved for advancement in the interview process, you will be invited to schedule a 60-minute video call with the hiring manager. We do our best to get back to you within 48 business hours, but feel free to reach out if you haven't heard from us or have questions.

In the meantime, we invite you to check out our [Blog](#), follow us on [LinkedIn](#), and keep an eye on our [Careers Page](#) to learn more about How to [Raise the Bar](#) with us!

Please let us know if you have any questions or feedback and once again, we appreciate the time you spent with us – it means a lot, thank you!

Best,

The [Company Name] Talent Team

- = Send Follow Up Email 1 Hour After RPS [if Not Set Up on Automated Workflow]
- = Complete Evaluation & Update Workflow in ATS
- = Set Up Next Steps
  - ✓ [1] Rejected = Schedule Rejection Email [3-day default delay]
  - ✓ [2] Submit to HM [Hiring Manager] or
  - ✓ [3] Schedule HMI [Hiring Manager Interview]

■ NOTE: Job Application Links are specific to the job requisition in jobvite and must be generated for each individual job requisition. See the links page for more detail.



# Initial Screening

## Links:

Job Description  
[Company Name] Blog  
[Company Name] LinkedIn Company Page  
[Company Name] Careers Page  
Raise the Bar Video  
Job Application

## Attachments:

Careers @[Company Name] One Pager  
The Interview Process

## RPS = Follow Up [1 Hour After Initial Screen Complete]

Hi [First Name],

Thank you so much for your time today and your interest in the [\[Job Title\]](#) position at [Company Name]. It was a pleasure speaking with you and learning more about your career and experiences.

### What's Next?

As we adhere to strict data protection guidelines, if you have not already provided consent to process your information, through a job posting application or other method, you will be receiving a separate email asking that you grant permissions. Please follow the link(s) in the separate data processing email to consent. Please note if you have previously applied and some time has passed, you will likely need to grant permissions again.

Your [Company Name] recruiter will be entering information from your call and submitting it to our hiring managers for review. If approved for advancement in the interview process, you will be invited to schedule a 60-minute video call with the hiring manager. We do our best to get back to you within 48 business hours, but feel free to reach out if you haven't heard from us or have questions.

In the meantime, we invite you to check out our [Blog](#), follow us on [LinkedIn](#), and keep an eye on our [Careers Page](#) to learn more about How to [Raise the Bar](#) with us!

Please let us know if you have any questions or feedback and once again, we appreciate the time you spent with us – it means a lot, thank you!

Best,

The [Company Name] Talent Team

- = Send Follow Up Email 1 Hour After RPS [if Not Set Up on Automated Workflow]
- = Complete Evaluation & Update Workflow in ATS
- = Set Up Next Steps
  - ✓ [1] Rejected = Schedule Rejection Email [3-day default delay]
  - ✓ [2] Submit to HM [Hiring Manager] or
  - ✓ [3] Schedule HMI [Hiring Manager Interview]

■ NOTE: Job Application Links are specific to the job requisition in jobvite and must be generated for each individual job requisition. See the links page for more detail.

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# Initial Screening

## Links:

[\[Company Name\] Careers Page](#)

## After Interview: **NOT** Moving Forward

We would like to thank you for the opportunity to discuss your professional experience with regard to the role of [job-title] at [company-name]. We regret to inform you that we have decided to proceed with other candidates.

While we are not able to offer you a position at this time, we would like to keep in touch with you for the future.

In order to consider you in the future recruitment processes at [company-name] and to ensure that we comply with the European Union's GDPR regulations, we are asking everyone affiliated with the EU to accept the following consent [consent checkbox].

In case we do not receive the consent, we are not able to invite you to participate in other recruitment processes.

We appreciate your interest in our company and we hope you will remain enthusiastic about our company.

= Updated ATS



# Technical / Manager Interview

# Technical / Manager Interview

## Links:

Job Description  
[Company Name] Blog  
[Company Name] LinkedIn Company Page  
[Company Name] Careers Page  
Raise the Bar Video  
**Attachments:**  
Careers @[Company Name] One Pager  
The Interview Process

## HMI = Invite [Within 48 Hours of RPS]

Hi [First Name],

Thank you for taking the time to talk to me about the [Job Title] position at our company. I enjoyed getting to know you and I'd like to invite you for a 60-minute video interview with our Hiring Manager, [Hiring Manager], [HM Title].

I have the following times available for your interview:

- = [Week] day, [Month] [Day] at 00:00 xm EST
- = [Week] day, [Month] [Day] at 00:00 xm EST
- = [Week] day, [Month] [Day] at 00:00 xm EST

Please let me know if any of these times work for you.

Best,

We invite you to check out our [Blog](#), follow us on [LinkedIn](#), and keep an eye on our [Careers Page](#) to learn more about How to [Raise the Bar](#) with us!

= Updated in ATS

**Once Scheduled:**

- = Automated Workflow for Confirmation Email to Candidate
- = Automated Workflow for Reminder Email to Candidate
- = Automated Workflow for Follow Up Email to Candidate 1 Hour After HMI



# Technical / Manager Interview

## Links & Attachments:

LINK: Job Description  
LINK: HM LinkedIn Profile  
LINK: [Company Name] Blog  
LINK: [Company Name] Careers Page  
LINK: Raise the Bar Video  
ATTACHMENT: Interview Prep  
ATTACHMENT: Careers @[Company Name] One-Pager  
ATTACHMENT: Panel Interview Task  
HMI: Reminder + RPS Details + Links:  
LINK: Job Description  
LINK: Google Meet  
LINK: Rescheduling Calendar

## HMI Booked = Confirmation [Immediate @Booking]

Hi [First Name],

This is to confirm your interview with [Interviewer] on [Event Date] at [Event Time] about the [\[Job Title\]](#) position at [Company Name]. If anything should come up, please use the links provided to cancel or reschedule your call.

In the meantime, we invite you to check out our [Blog](#), and keep an eye on our [Careers Page](#) to learn more about How to [Raise the Bar](#) with us!

Best,  
The [Company Name] Talent Team

- = Update ATS
- = Set automated workflows or reminder to send
  - ✓ [1] Reminder 24 Hours Before RPS
  - ✓ [2] Follow up email(s) 1 Hour After HMI

## HMI Booked = Reminder [24 hours Before]

Hi [First Name],

This is a friendly reminder that your call with [Hiring Manager] from [Company Name] regarding the [\[Job Title\]](#) position is at [event\_time] on [event\_date].

[Google Meet link]

If this time no longer works for you, please use the links provided to reschedule, otherwise have a great call tomorrow and good luck!

Best,  
The [Company Name] Talent Team

- = Send HMI Prep if Not Scheduled on Automated Workflow

# Technical / Manager Interview

## Links:

[Job Description](#)

## HMI Booked = Cancellation

Hi [First Name],

Best,  
The [Company Name] Talent Team

In the meantime, we invite you to check out our [Blog](#), and keep an eye on our [Careers Page](#) to learn more about How to [Raise the Bar](#) with us!

- = Update ATS
- = Set automated workflows or reminder

## HMI Booked = Reschedule

Hi [First Name],

Best,  
The [Company Name] Talent Team

- = Update ATS
- = Set automated workflows or reminder



# Technical / Manager Interview

## Links:

[Careers Page](#)

## After Interview: **NOT Moving Forward**

Hi [First Name],

We would like to thank you for the opportunity to discuss your professional experience with regard to the role of [job-title] at [company-name]. We regret to inform you that we have decided to proceed with other candidates.

While we are not able to offer you a position at this time, we would like to keep in touch with you for the future.

In order to consider you in the future recruitment processes at [Company Name] and to ensure that we comply with the European Union's GDPR regulations, we are asking everyone affiliated with the EU to accept the following consent:

"I hereby grant [Company Name] SA, [Company Name] Services sp. o.o., [Company Name] Poland sp. o.o. and every subsidiary company of [Company Name] SA ("[Company Name]") consent to process my personal data relating to my job application and contained in my recruitment documents (recruitment form, CV, cover letter) obtained by [Company Name] through LinkedIn or other business-oriented services or collected during recruitment process (i.a. tests answers, solutions to assignments and results of reading comprehension tests or psychometric tests) for the purpose of participating in future recruitment processes conducted by [Company Name]."

If you agree with the above statement, please send the content of the consent to us in a return e-mail message. In case we do not receive the consent, we are not able to invite you to participate in other recruitment processes.

We appreciate your interest in [Company Name] and we hope you will remain enthusiastic about our company.

Best,

The [Company Name] Talent Team

= Update ATS

# Technical / Manager Interview

## Links:

Job Description  
[Company Name] Blog  
[Company Name] LinkedIn Company Page  
[Company Name] Careers Page

## HMI = Follow Up [1 Hour After HMI Complete]

Hi [First Name],

Thank you so much for your time today and your interest in the [\[Job Title\]](#) position at [Company Name].

### What's Next?

**[ACTION REQUIRED]** Please update your [Company Name] recruiter directly regarding thoughts, questions and intentions for moving forward in the interview process with us.

**[ACTION OPTIONAL]** If you would like to send a follow up email to the hiring manager, please feel free to email them directly at [\[hiring.manager@\[Company Name\]ouse.com\]](mailto:hiring.manager@[Company Name]ouse.com).

The hiring manager will be entering information from your call into our internal system and connecting with your [Company Name] Recruiter directly for feedback and instructions for next steps. We do our best to get back to you within 48 business hours, but feel free to reach out to your recruiter if you haven't heard from us or have questions. Attached you will find additional details about our interview process.

Please let us know if you have any questions or feedback and once again, we appreciate the time you spent with us – it means a lot, thank you!

Best,

The [Company Name] Talent Team

We invite you to check out our [Blog](#), follow us on [LinkedIn](#), and keep an eye on our [Careers Page](#) to learn more.

- = Send Follow Up Email 1 Hour After HMI [if Not Set Up on Automated Workflow]
- = Connect with Hiring Manager for Feedback
- = Set Up Next Steps
  - ✓ [1] **Rejected** = Schedule Rejection Email [3-day default delay]
  - ✓ [2] **MOVE FORWARD** = Schedule Final Interview, Tasks/Tests [Final Interview]



# Final Panel Interview

# Final Panel Interview

## Links:

[Job Description](#)

[\[Company Name\] Blog](#)

[\[Company Name\] LinkedIn Company Page](#)

[\[Company Name\] Careers Page](#)

## Attachments:

[The Interview Process](#)

[Careers @ \[Company Name\] One Pager](#)

## Final Interview = Invitation / Scheduling

Hi [First Name],

Good news! I received positive feedback from your call with [Hiring Manager] and we would like to invite you to advance to next steps in the process which would be presenting a case study during a panel interview with the hiring manager (Sean Greene), our President (Tomasz Wnuk) and additional manager, who will be making up the hiring committee. Once confirmed, you will receive instructions for your final interview along with additional resources.

I have the following times available for your panel interview:

- = [Week]day, [Month] [Day] at 00:00 xm EST
- = [Week]day, [Month] [Day] at 00:00 xm EST
- = [Week]day, [Month] [Day] at 00:00 xm EST

Please let me know if any of these times work for you. And congrats!

Best,

The [Company Name] Talent Team

We invite you to check out our [Blog](#), follow us on [LinkedIn](#), and keep an eye on our [Careers Page](#) to learn more about How to [Raise the Bar](#) with us!

= Set Reminder or Workflow Automation to Follow Up if Not Scheduled [2-day default]



# Final Panel Interview

## Links:

Job Description  
[Company Name] Blog  
[Company Name] YouTube Channel  
Interviewer LinkedIn Pages

## Attachments:

Interview Prep  
Business Task Instructions  
One Sheet from HM

## Final Interview = Confirmation

This is to confirm your panel interview for the [Job Title] position at [Company Name] is as follows:

Date & Time: Friday, 23 September - 12:00 – 1:00 pm EST

Google Meet joining info video call link: [link]

Interviewers:

Sean Greene, Hiring Manager ([sean.greene@\[Company Name\]ouse.com](mailto:sean.greene@[Company Name]ouse.com))

Tomasz Wnuk, President - North America ([tomasz.wnuk@\[Company Name\]ouse.com](mailto:tomasz.wnuk@[Company Name]ouse.com))

Richard Johnson, VP, Head of Sales (Enterprise Direct Team) - US & Canada ([richard.johnson@\[Company Name\]ouse.com](mailto:richard.johnson@[Company Name]ouse.com))

If conflicts should arise, please let me know. I will be available to you during the time of your interview in the event you need an assist, but I am sure you will be just fine. *Pro tip: Google Meet works better on Chrome than Safari.*

I have attached the business task to this email and encourage you to direct detailed questions to Sean Greene for assistance.

### Helpful Resources Before the Panel Interview

**Hiring Manager** - candidates sometimes shy away from asking the hiring manager questions for fear of eliminating themselves but end up really missing out on an opportunity to further connect and learn more about the role, as well as prepare, so I sincerely recommend using this resource as it will only help you along the way.

**Recruiter** - I also recommend a prep call with your recruiter (that's me!), if you would like a few useful tips to keep in mind while presenting or have questions. No inquiry is too small! Just let me know how I can help. Love is in the details, and I hope you will enjoy the panel exercise - I know I did! If you would like to set something up, please use this link to schedule time for us to chat ideally a few days before your interview: [Recruiter Calendar Link]

### Company information

[Company Name] Company Blog | [Company Name] YouTube Channel | [Company Name] NYC Office Tour | [Company Name] Employees | [Company Name] Benefits Cookieless Article | [Company Name] Graphics

### After the Panel Interview

If you wish to send follow up notes after your interview, please feel free to email your interviewers directly at the email addresses provided above.

After your panel, the hiring committee will be meeting on the outcome, which can be one of three options:

1. Request follow up - usually in cases when not enough information was gathered or to verify / review specific topics
2. Proceed to offer
3. Not proceed to offer

I will be in close contact with the hiring committee and aim to provide as much feedback as possible within two business days. Please keep me in the loop on your end and as always consider me a resource for anything you may need.

We hope to make this process as painless as possible, so please let us know how we can help. Congrats, we're happy to have you!

= Set Reminder or Workflow Automations for Reminders [24 Hours Before Final Interview]

# Final Panel Interview

## Links:

[Job Description](#)

[Google Meet](#)

## Final Interview = Reminder [24 Hours Before]

Hi [First Name],

This is a friendly reminder that your Final Interview with [Company Name] regarding the [\[Job Title\]](#) position is at [event\_time] on [event\_date].

[Google Meet link]

If this time no longer works for you, please contact your [Company Name] [Recruiter](#) directly to reschedule, otherwise have a great meeting tomorrow and good luck!

Best,  
The [Company Name] Talent Team

= Set Reminder or Workflow Automation to Follow Up if Not Scheduled [2-day default]



The background is a dark, atmospheric photograph of a mountain range. The peaks are silhouetted against a slightly lighter, hazy sky, suggesting a time of day like dusk or dawn. The overall tone is moody and professional.

# Offer Stage

# Offer Stage

## = Offer Letter

Hi [First Name],

Our hiring team was excited to meet and get to know you. It is my pleasure to offer you a position of [Job Title] at [Company Name].

You will report to [Hiring Manger].

Please find below the offer details:

Monthly gross salary: \$X  
Days of paid vacation per year: X  
Contract type: X  
Start date: X  
Notice period: X  
[other benefits]\*\*

Please find attached the terms and conditions of your employment, should you accept this offer letter. We would like to have your response by [DATE]. In the meantime, please feel free to contact me via email, if you have any questions.

We are all looking forward to working with you.

Best,



# New Hire Onboarding

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# Onboarding Stage

## = Onboarding

Dear [First Name],

I would like to gladly welcome you on board!

Our team will be contacting you soon with information about the further steps.

In case of any questions, please contact your Hiring Manager.

Best,

The background is a dark, atmospheric photograph of a mountain range. The peaks are silhouetted against a slightly lighter, hazy sky, suggesting a time of day like dusk or dawn. The overall tone is moody and serene. The text 'Additional Information' is overlaid in a clean, white, sans-serif font, positioned on the left side of the image.

# Additional Information

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# **Links & Candidate Resources**



# Candidate Journey - Automated Operating Model (Swimlanes)

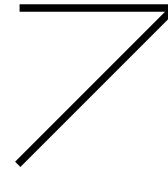
	Sourcing	Initial Screen	Technical /HM Interview	Final Interview	Offer	Onboarding
<b>Recruiter</b>	<ul style="list-style-type: none"> <li>- 3 touch outreach</li> <li>- HM Intake</li> <li>- Referral replies</li> </ul>	<ul style="list-style-type: none"> <li>- Advance ATS stage</li> <li>- Conduct Initial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

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# Let's discuss!

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