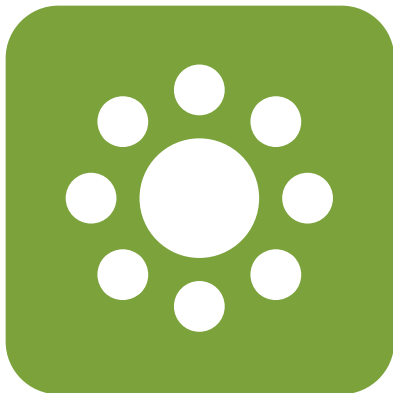




# Strategic CRM for Recruiting



Candidate Relationship Management (CRM) is a category of software that, in its very basic form, helps recruiters organize, automate, and synchronize candidate attraction and marketing activities. Like its close cousin Customer Relationship Management (CRM) software, Candidate Relationship Management tools are designed to help you manage and communicate with, and manage profiles for large number of candidates.

Most applicant tracking systems have some basic capabilities for communicating with active candidates, but are focused primarily on the application-to-hire process.

Over the last few years various specialized point solutions have emerged to provide more advanced capability, from basic contact management tools to more robust tools for capturing candidate profiles, automating sourcing, segmentation and engagement of massive numbers of candidates. The more sophisticated tools are changing the way recruiting organizations operate by allowing them to search, segment, and engage huge volumes of candidates with pinpoint accuracy.



## CRM Recruiting Challenges

**High cost-per-hire.** Lack of a growing, proprietary talent pool from which to source requires more spending on job boards and recruiting agencies to meet basic hiring demands.

**Difficulty sourcing candidates.** Despite having access to past applicants and various external candidate databases, search tools can be complex, non-intuitive, and plain ineffective at identifying available qualified candidates.

**Disconnected candidate sources.** Most ATS users must search internal candidates, past applicants, and 3rd party sources using different tools with no ability to view, evaluate, and engage resulting candidates in a holistic manner.

**Limited access to passive candidates.** In addition to search challenges, many organizations have no easy way for passive candidates to express interest in their company without submitting a full application.

**Difficulty meeting hiring demand.** Without the ability to prepare for future needs by building pipelines of potential candidates, many organizations find it difficult to ramp up hiring for key positions when talent needs accelerate.

**Lack of scalable engagement.** Talent pool effectiveness plummets when members are ignored. Many organizations have difficulty keeping candidates warm with high volume email campaigns and the various email spam regulations that come along with them.

**Poor standardization.** Many organizations have recruiters in multiple locations with little to no procedural consistency, from systems to practices, resulting in duplicate candidate interaction, wasted effort, and inability to refine results by developing best practices for recruiter outreach.





## Strategic Candidate Relationship Management (CRM) Solutions

CRM solutions allow you to capture candidate profiles quickly from multiple sources and centralize them in a proprietary talent pool, whether they apply for a job, are sourced from a job board database or from social media networks, etc. Once captured, CRM tools can enable and track your communications with those candidates as you invite them to apply, inquire about their qualifications, or include them in targeted email campaigns about how great your company is to work for.

As with many newer recruiting applications, CRM solutions come in a number of different flavors, from basic to sophisticated. At its most basic, CRM tracks candidate data and supports one-to-one candidate emails. Some applicant tracking systems (ATS) provide basic CRM functionality. Third party CRM solutions operate outside your ATS and are used by everyone from general recruiters to dedicated sourcers to recruitment marketing departments.

Increasingly, strategic CRM is being utilized in more holistic ways, with more sophisticated tools offering two-way integration with the ATS, federated search for sourcing from internal and external candidate sources, talent network capability, and automated email tools for individual or mass email campaigns.

This strategic approach places high value on building a growing, centralized talent pool from which you can segment, source, nurture, and campaign talent, reducing reliance on reactive sources for meeting hiring demand.

The key to being effective with CRM is to understand what strategies you are trying to support, as this will do the most to define your needs. CRM systems are typically used to:

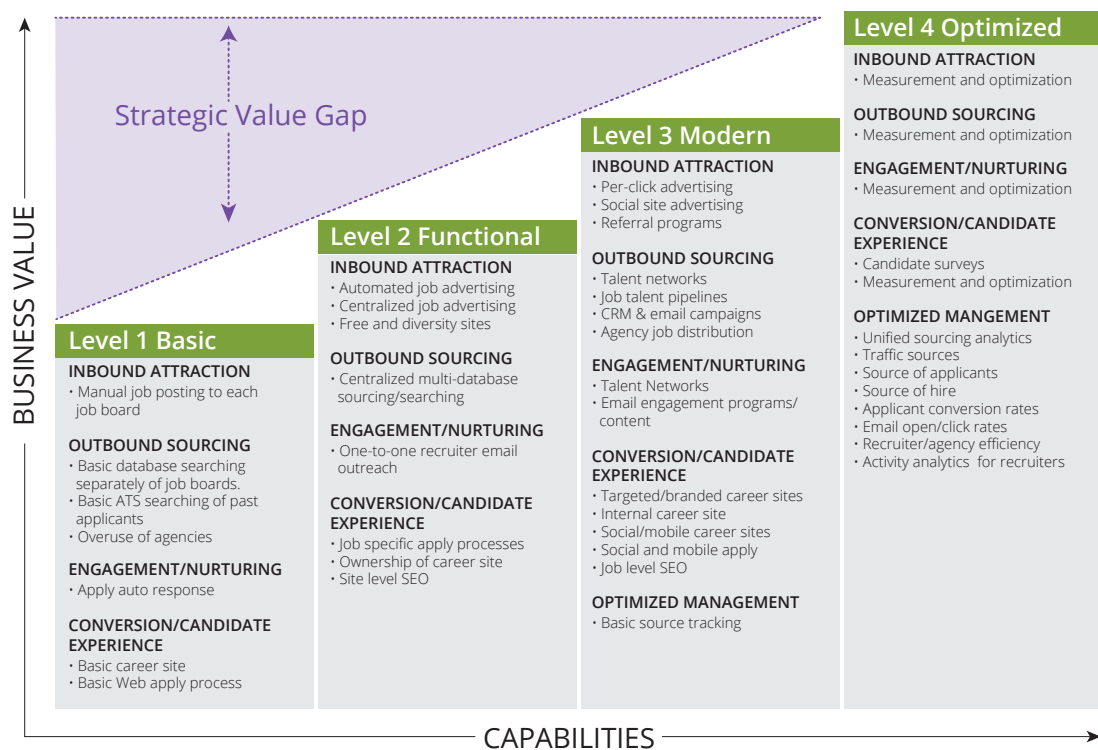
- Enable the recruitment marketing function to build a centralized talent pool, from all sources, past applicants, job boards, social networks, etc.
- Enable opt in capabilities to allow candidates to request to be added to your talent database
- Segmenting candidates by job family, location, and talent type, and executing ongoing engagement campaigns so the talent pools are kept warm for sourcing
- Support the sourcing/recruiting function in filling specific openings with specialized talent and tracking their outreach
- Helping the sourcing/recruiting function to fill high volume positions by searching for large numbers of candidates, inviting them to apply, and tracking engagement



- Delivering clear analytics that show recruiter activity and which talent sourcing activities are leading to hires
- Managing all talent database vendors and controlling the costs and keeping use of these systems in line with results

While often viewed as separate, these activities are complimentary and each supports the other. Your talent pool, for example, supports mass candidate outreach as well as both volume and targeted hiring. So using tools that can support all these activities and unify them in a synergistic way across the organization can significantly amplify results.

Organizations that consider implementing strategic CRM typically fall between Level 2 and Level 3 of the Talemetry® Recruitment Marketing Maturity Model and are attempting to move to more proactive recruiting strategies in one or all of the categories outlined above.



Talemetry Recruitment Marketing Maturity Model



## CRM Considerations

When considering utilizing CRM solutions within your organization, there are several best practices that will ensure you get full value from your efforts, including:

### Building, segmenting, and engaging talent pools

- **Enhance and extend your ATS.** Applicant tracking systems offer basic information tracking and email capability. Strategic CRM enables significant advances in recruiting outcomes, rather than basic enablement of candidate communication.
- **Grow your pool.** The #1 value of strategic CRM is the ability to centralize and grow all the candidates that you acquire through your recruiting efforts. Make the growth and quality of this talent pool the main focus of your CRM strategies.
- **Don't forget talent networks.** Talent networks are a big part of your overall talent pool. Implementing talent networks that integrate with your overall talent pool increases your access to passive candidates that are predisposed to working for your company.
- **Integrate your ATS.** Whether you have hundreds, thousands, or millions of past applicants, your ATS database is a valuable source of future hires. Lack of two-way integration between your ATS and CRM limits your hiring results, and makes strategic management of your valuable centralized talent pool virtually impossible.
- **Be proprietary.** Maximize resume searches, LinkedIn profiles, advertising, talent networks, database searches, agencies, etc. by pulling qualified candidates into your pool. Once you have them, you never have to pay for them again.
- **Segment your pool.** Use your CRM search tools to group your candidates into pipelines for key job families. Search by skills, experience, location, etc. As you interact with candidates, make sure to gather additional information to use for further segmentation to ensure you send messages relevant to the recipients.
- **Heat your talent pool.** This is where CRM adds tremendous value by keeping potential candidates "warm." Use your segmented lists of targeted candidates and send email campaigns to invite them to apply. Schedule regular mass emails with company news, exciting developments, surveys, or internal content of interest to potential candidates.

### Recruiting for specialized talent

- **Integrate your sourcing.** Sourcing is a big part of strategic CRM so make sure your CRM supports integrated searching of all sources including past applicants, resume databases, job boards, etc. Separate solutions for sourcing from external candidate databases and internal talent pools increases complexity and limits access to the best candidates.

- **Tap your “Silver Medalists.”** Make sure you are finding and engaging candidates that were good enough to reach the interview stage for previous hires.
- **Search first.** Utilize your CRM search tools to pinpoint talent in your proprietary talent pool before spending money on external searches and job ads.
- **Create pipelines.** Build lists or folders for jobs you typically hire for. As you search your talent pool and come across candidates that would be good for these types of jobs assign them to the folders for future opportunities.
- **Search passive candidates.** Talent networks are a great place to search for candidates with specific skills who may be employed with a competitor or within a target industry.
- **Solicit referrals.** They're often your best source for specialized candidates. Make it easy for employees to add referrals to your talent pool.

## Sourcing for high volume positions

- **Search, send, and measure.** Develop targeted searches and send mass apply invitations to large amounts of candidates. Then measure results and refine your searches and emails based on response rates and hiring success over time.
- **Run scheduled searches.** Once you have your searches defined, regularly run them against your best performing source databases and pull the results into your CRM for sourcing.
- **Always be sourcing.** For those always-open, high turnover positions, automatically add qualified applicants to talent pools and run regular campaigns inviting new candidates to apply.

## Optimizing operations

- **Standardize and develop best practices.** With all your recruiters, sourcers, and marketers using a single tool for sourcing and engaging candidates, monitor results and begin to standardize your practices around your most successful sources, emails, searches, etc.
- **Try new sources.** Strategic CRM is all about testing, refining, and optimizing, so try new candidate sources frequently.
- **Measure everything.** Set up key success criteria and monitor these metrics frequently:
  - Talent pool growth. Is it growing appropriately? Which sources are most effective?
  - Talent pool growth by key job types. Are you getting opt-ins for important talent types, locations, etc.?

- Number of hires being made from your sourcing activities and from which database sources?
- Recruiter activity and performance. How are your recruiters' direct sourcing activities adding value to your recruiting process?
- Candidate open and click rates. How active and engaged are the candidates in your talent pool with your company?
- Database performance. How are your database vendors performing for you?



## Talemetry Source & CRM

Talemetry's sourcing and CRM solutions integrate with your applicant tracking system to allow you to search, source, and engage candidates from internal and external sources from a single interface.

It was designed to support both established and emerging best practices to help companies move from more basic/functional to more strategic and optimized recruiting capabilities. Key features of Talemetry sourcing and CRM solutions include:

- **Real time integration with your ATS.** This ensures jobs are up-to-date and you can search and engage candidates from all sources from a single interface.
- **Consolidated talent pool.** Internal and external candidate sources are centralized in a single valuable talent pool for segmentation, sourcing, and email campaigning.
- **Candidate pipelines.** Candidates can be automatically added to folders (talent pipelines) for existing job openings in your ATS, or segmented folders for future needs.
- **Federated, semantic search.** Talemetry manages your subscriptions and integrations with external candidate databases and provides intuitive, semantic search tools so you can easily mine internal and external sources with one seamless tool. No jumping from system to system.
- **Talent networks.** Integrated talent networks let you allow passive candidates to quickly and easily opt-in for future job notification and other communications.
- **Automated email campaigns.** Once best-fit candidates or targeted candidate segments are identified, it's easy to reach out with individual emails or conduct both ad hoc and automated email campaigns.
- **Enterprise capability.** Send millions of monthly emails with built in safeguards to help ensure anti-spam compliance.
- **Consolidated candidate profiles.** Talemetry combines multiple resumes from multiple systems into a single candidate profile with visual work history. Get a 360-degree view of a candidate based on multiple sources.



- **OFCCP compliance.** Ensure recruiters have access to search diversity boards and track and save all searches in case of an OFCCP audit.
- **Increased ROI.** Talemetry manages your sourcing vendors based on current contracts to maximize utilization. All candidates from all sources are retained in your talent pool so you never pay for the same candidate twice.
- **Full analytics.** Track which sources are providing the most hires, which emails are most effective, and which recruiters are getting the best results from their candidate outreach.



## Getting Started with Strategic CRM

Implementing strategic CRM in conjunction with your ATS is relatively straightforward, but should be driven by strategic objectives, current processes, and desired outcomes. Here are some key steps you'll want to take prior to rolling out a solution:

- Get clear on which strategies are most important. Are you primarily building a talent pool from scratch or do you have multiple sources you'd like to consolidate? Are you sourcing for high volume jobs? Are you focused on implementing talent-marketing programs? Do you want better access to "Silver Medalists?" All of the above? This will help you be specific with your needs and prioritize your focus.
- Identify all the source databases you currently hire from (ATS, external subscriptions, talent networks, etc.). This will be the baseline number of applicants from which you can benchmark future growth.
- Segment your candidate targets into desired job families by job type, location, etc. Once you've integrated your candidates into one talent pool, you will want to be able to segment them by strategic needs.
- Mock up a communication schedule and consider what you want to communicate to the different segments of your talent pool and at what intervals you want to message them.

For more information about Talemetry's sourcing and CRM solutions, visit

[talemetry.com](https://talemetry.com)

