eBook

A guide to the most common CRM use cases

Best practices and real-life scenarios

greenhouse

Contents

Introduction

Recruiting candidate relationship management (CRM) software is an increasingly popular sourcing strategy for a lot of great reasons.

So you know you need a CRM strategy – but how do you actually action it? The most common questions we get are about the practical side of setting up a CRM strategy:

- What are the most common use cases for CRM?
- What types of communication strategies might you use?
- How do you leverage CRM most effectively?

To shed some light on the topic, we've gathered some operational scenarios that might help you design the CRM strategy that will work for your business.

Setting up a CRM can seem daunting at first – but not to worry.

Here are some of our best recommendations for getting started:

Start with one use case

Test it out, then build from there. You should choose one scenario that's straightforward for your business, incorporate it into your teams' workflows and then expand from there.

Ask two questions

When creating pools, there are two main things to think through:

1. **What will I be looking for when evaluating candidates for future roles?**
   For example, you might want department-specific pools, because you know that for open engineering roles, you only consider applicants with engineering experience on their resume and so will want them cleanly grouped together.

2. **What type of communication will resonate?**
   When there are prospects for whom the same type of communication makes the most sense, group them together!

Designate an owner

CRMs require regular maintenance. Ask your sales operations team for tips! They can share their best practices, including having someone who's dedicated to helping keep the tool clean and running.

Keep it simple

Don't worry about making your outreach communications beautiful and picture-perfect – you're probably not a professional content creator, and that's totally fine. The end goal is to reach out to the prospect with a compelling message, which is often short, sweet and just looks like plain text.

Still not sure where to begin? Try thinking about the addition of any new pools and stages as anything you can't already filter using the default settings you see in Greenhouse CRM, such as department, office, job and source. Any use cases beyond those are pools and stages that you can create according to your business needs.

Our advice

Use pool reminders to more easily remember the next workflow steps for all your prospects and make sure you keep up with the desired cadence.

With reminders nudging you to perform the right action at the right time, you are able to ensure that your brand is top of mind.

Scenario 1

Internal talent marketplace

Who are they?

An internal talent marketplace refers to current employees who have expressed interest in a job internally. By putting these prospects in the context of recruiting – including an updated resume, experience and employee intent – recruiters are able to better understand the existing internal talent pool, facilitate internal mobility and action them appropriately.

How do they get into the system?

Employees complete a prospect post from the internal job board in order to express interest in new roles.

How do you organize them?

Create a prospect pool called "internal talent marketplace" and start adding prospects! You can also use prospect review to help you triage prospects into other pools and convert them into candidates for specific roles when the time is right. From there, recruiters are able to select from that pool and use prospect review to look through applications quickly and efficiently.

What would you do with them?

When opening a new job, search through your internal talent marketplace pool first before sourcing externally in order to drive internal mobility and potentially reduce both time-to-hire and cost-per-hire (reducing agency spend and internal spend).

Communication strategy

Not contacted

No template – put internal applicants directly into this stage until you are ready for initial outreach. Review these candidates to determine which track of communication makes the most sense.

Contacted and follow-ups

Create templates that are easily personalized for initial contact and each follow-up.

Responded – in discussion

No templates – this will all be custom communication as you discuss the role.

Scenario 2

Silver medalists

Who are they?

Silver medalists are candidates who did really well in the interview process but didn't end up getting get hired – maybe it was a matter of bad timing, not the right role, budget or a particularly competitive hiring class. These are desirable individuals you want to keep warm in your CRM database so that you are able to more easily reach out to them in the future.

How do they get into the system?

They're already there! You just have to organize them as prospects in a pool when you decide not to hire them the first time.

What would you do with them?

Send silver medalists regular nurture emails to keep your relationship warm and your company top of mind. When opening a new job, search through your silver medalists pool before sourcing externally and potentially reduce both time-to-hire and cost-per-hire (reducing agency spend and internal spend).

Our advice

Note that every time you reject a late-stage candidate, you should consider creating a prospect application.

This is a behavior you'll want your entire talent team trained on so that these valuable silver medalists stay warm within your talent database and receive the right communication strategy, keeping your brand top of mind.

Communication strategy

Keep warm

Monthly newsletter with new job openings, company updates and engaging content (new company awards, PR mentions, published eBooks/blogs, product launches, etc.).

Reach out – specific role

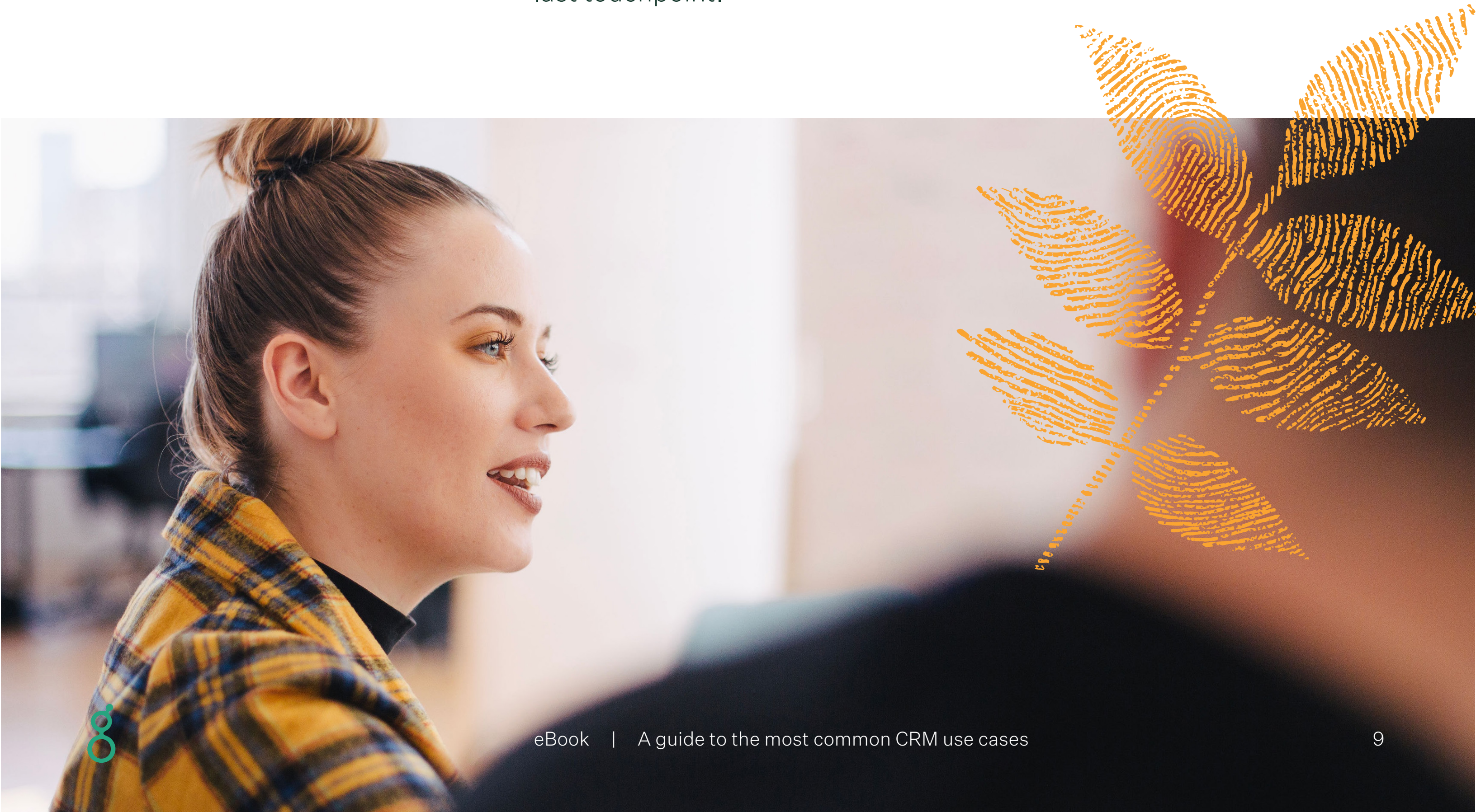
When you're trying to match them with a new opening, use a personalized message that introduces the prospect to the new job opening and specifically mentions what you know about their past experience that would make them a good fit.

In discussion

No templates – this will be completely custom communication as you discuss the role and encourage the prospect to apply.

No longer interested

No templates. You may want to further segment this stage by reason – some reasons may warrant moving the prospects back to the keep warm stage once a set amount of time passes since the last touchpoint.



Scenario 3

Talent community

Who are they?

Prospects that should be included in a talent community pool are those who have expressed interest in your company more generally, versus a specific job. These are individuals who may be highly qualified for a role that is not currently open and are worth keeping tabs on for the future.

How do they get into the system?

Possibly met at an event, applied to a “general” job on your careers page via prospect posts or referred to no specific job.

How do you organize them?

Create a pool or multiple pools depending on where you’re getting them and how specific you want your nurture emails to be (an engineering talent community might get different content than a marketing talent community).

Within the various pools, you might have stages such as monthly nurture, quarterly nurture and in discussion depending on how high-touch you’d like to be.

What would you do with them?

Send a regular newsletter with new job openings, company updates and engaging content (new company awards, PR mentions, published eBooks/blogs, product launches, etc.).

If/when a prospect responds showing interest in a specific job, move them to the in discussion stage in the pool.

Communication strategy

Not contacted

No templates – review these candidates and determine which track of communication makes the most sense.

Monthly/quarterly nurture

Newsletter with new job openings, company updates and engaging content (new company awards, PR mentions, published eBooks/blogs, product launches, etc.).

In discussion

No templates – this will be completely custom communication as you discuss the role and encourage the prospect to apply.

No longer interested

No templates. You may want to further segment this stage by reason – some reasons may warrant moving the prospects back to the nurture stages if a set amount of time passes since the last touchpoint.

Scenario 4

Cold outreach

Who are they?

These are individuals you've found via sourcing online who haven't yet expressed interest in your company. They will likely have varying degrees of familiarity with your organization and may require more of a sales pitch to be convinced that you are worth their time.

How do they get into the system?

Prospects enter the system through the Greenhouse browser plug-in, through manual entry by getting uploaded directly by spreadsheet or by being imported from a partner (for example, Entelo or LinkedIn).

How do you organize them?

Create a prospect pool called cold outreach – possibly a pool per sourcer or per topic (for example, engineering vs. sales) depending on your size.

Create prospect stages of not contacted, contacted 1x and waiting, contacted 2x and waiting, contacted 3x and waiting, unresponsive and in discussion.

What would you do with them?

Once you've added a set of people to not contacted, try a cold contact and then move the person to the next stage.

Note that some recruiters do this one at a time and personalize each email while others do it in bulk – the strategy you take will depend on what roles you're attempting to fill (for example, you might spend a little more time personalizing cold outreach to a prospect for an executive role than for an entry-level position) and how much time you have.

Wait a few days and repeat the process, moving those prospects to contacted 2x and waiting.

If someone responds positively, move them to discussion.

If someone responds negatively, mark them as no longer considering or not interested.

If there is no response, move them to unresponsive and mark as no longer considering with a reminder to follow up in six months to a year.

Communication Strategy

Not contacted
No template – put new prospects that you have sourced directly into this stage until you are ready for initial outreach. Strategically message these prospects to strike a balance between bulk messaging and personalization (for example, message by university or shared background).

Note that prospects appreciate personalization – we interviewed actual prospects for their advice to recruiters on what messages resonate most and they really do notice that extra touch.

Contacted and follow-ups
Create templates that are easily personalizable for initial contact and each follow-up.

Responded – in discussion
No templates – this will all be custom communication as you discuss the role and encourage them to apply.

Responded – not interested
Create a template that invites these prospects to opt into future job updates or follow your organization on social media.

Scenario 5

Past employees

Who are they?

These are individuals who have previously worked at your company

How do they get into the system?

If you hired the past employees through Greenhouse, they should already be in the system. As soon as they leave the company – assuming a mutually agreeable departure – you should start systematically adding them as prospects to keep in touch with them for the future.

How do you organize them?

Create a dedicated talent pool called alumni.

What would you do with them?

Send regular nurture emails with engaging content such as company news, alumni events or future positions.

Communication strategy

Monthly/quarterly nurture

Newsletter with new job openings, company updates and engaging content (new company awards, PR mentions, published eBooks/blogs, product launches, etc.).

Reach out – specific role

No templates – this will all be custom communication as you discuss the role and encourage them to apply.

Opted out

No templates. You may want to further segment this stage by reason – some reasons may warrant moving the prospects back to the nurture stages if a set amount of time passes since the last touchpoint.

Scenario 6

Interns

Who are they?

Current undergraduates who have worked at your company.

How do they get into the system?

If you hired the interns through Greenhouse, they should already be in the system. As soon as their internship is complete, you should systematically add them as prospects to keep in touch with them for the future.

How do you organize them?

Create a dedicated pool called interns.

What would you do with them?

Send regular nurture emails with content such as company news, alumni events or future positions.

Stay in touch to recruit them for full-time roles as they approach graduation.

Communication strategy

You'll want to tailor the messaging by graduation year and application deadlines at your company. Send nurture emails to graduates who are farther out and specific roles with personalized messages to upcoming grads.

Scenario 7

Contingent workforce

Who are they?

These are individuals who worked at your company for a contracted amount of time (freelancers, etc.).

How do they get into the system?

If you hired the contracted workers through Greenhouse, they should already be in the system. As soon as their contract is up, you should start systematically adding them as prospects to keep in touch with them for the future.

How do you organize them?

Create a dedicated pool called contingent workforce.

What would you do with them?

Send regular nurture emails with content such as company news, alumni events or future positions.

Reach out when a new contract position opens up.

Communication strategy

Monthly/quarterly nurture

Newsletter with new job openings, company updates and engaging content (new company awards, PR mentions, published eBooks/blogs, product launches, etc.).

Reach out – specific role

No templates – this will all be custom communication as you discuss the role and encourage them to apply. Leverage candidate tags and additional filters to determine who to move into this stage.

Opted out

No templates. You may want to further segment this stage by reason – some reasons may warrant moving the prospect back to the nurture stages if a set amount of time passes since the last touchpoint.

Scenario 8

College recruitment

Who are they?

Current college students.

How do they get into the system?

Met at an event, sourced through resume books, cold outreach, etc.

How do you organize them?

Create a campus/college recruitment pool (for example, Harvard Data Analytics & Technology Fair 2018, DePaul University or University of Denver Career Fair).

Depending on the scope of your college recruitment, you may want to segment by college or leverage candidate tags to more easily filter by school.

Create stages for graduation year to better organize your outreach.

What would you do with them?

Send regular nurture emails, reach out when applications open up and build pipelines for intern and entry-level roles.

Our advice

You may want to organize by intern class, by graduation year or by both – whatever best streamlines your communication and makes it easiest to find the right candidate for your future roles.

Communication strategy

There are a number of ways to organize your pools for effective college recruitment – by grad year, segmenting the individuals you have met on campus, or by school year, with stages for each grad year.

You could also create a career fair pool to manage the initial outreach and follow-ups from campus events.

Suggested email templates to create

Grads in the next 12–24 months
Newsletter with company updates, announcements about internship openings and application deadlines.

Grads this year
Communication about new entry-level roles and more personalized messages based on gold/silver/bronze categorization.

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