



The Recruiting Automation Playbook

Recruiting Automation: The future is here

Automation makes your hiring processes efficient, saves time and dollars, reduces errors and recruiter fatigue, helps you build deep, meaningful conversations with candidates, and when deployed right, delivers substantial business growth.

At this point, if you are not leveraging AI and automation to turbocharge your recruitment, you are missing out.

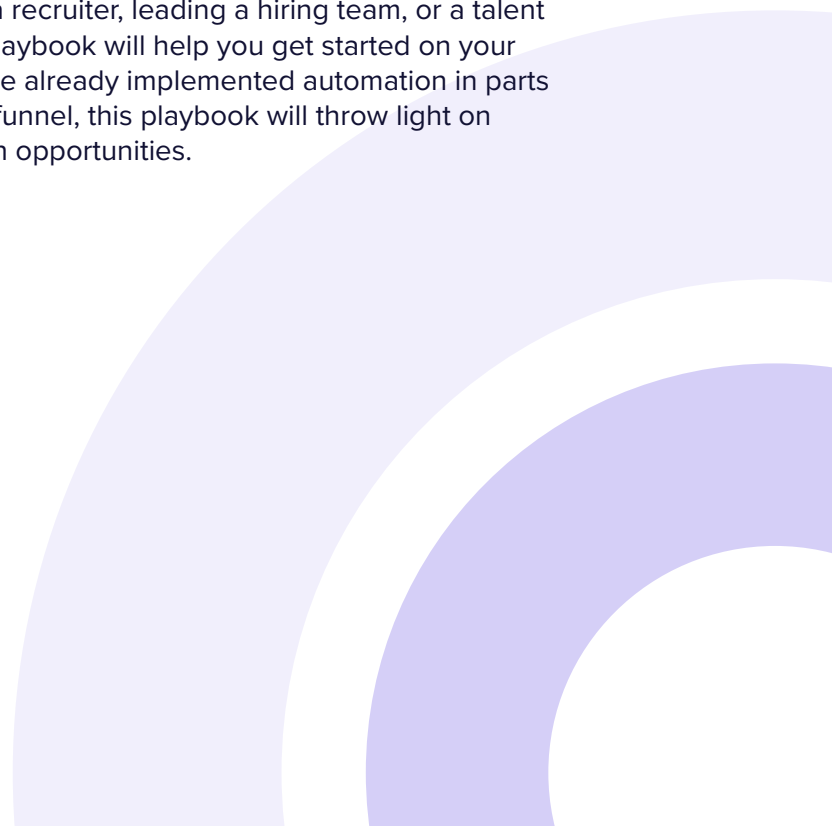
However, the scope and potential of recruiting automation are such that even if you see the potential gains, you are unsure how to get started.

What do you automate first? What tools are right for you? How do you measure the results? And how do you make a business case to your leadership?

In our Playbook for Recruiting Automation, we will answer all these questions and share real, relatable stories of automation from the hiring trenches.

Whether you are a recruiter, leading a hiring team, or a talent practitioner, this playbook will help you get started on your journey. If you have already implemented automation in parts of your recruiting funnel, this playbook will throw light on many more hidden opportunities.

Let's dive in!



What we'll cover

(pretty much everything you need to get hiring automation right)

First, the basics 01

1.1 Challenges in your recruiting process and funnel

1.2 Standard vs Strategic automation

Goal 1: Source and attract more qualified candidates 06

1.1 Source smart with a self-enriching database

1.2 Rediscover and activate hidden talent

1.3 Drive more applications with text to apply

1.4 Generate quality referrals from your employees and alumni network

Goal 2: Reduce hiring time with increased efficiency 18

2.1 Automate up to 90% of your hiring cycle (with AI-driven sourcing, screening and scheduling)

Goal 3: Deliver a stellar candidate experience 26

3.1 Connect with candidates through two-way texting

3.2 Reduce drop-offs and ghosting with Conversational AI

You're sold. What next? 36

4.1 Building a case for recruiting automation to your leadership

4.2 A checklist for recruiting automation

*First,
the basics.*

Recruiting processes

can be expensive, complex and inefficient. Here's why



High Drop-Off

100:1

applicant to hire ratio

Manual screening leads to high drop-off



Stale, underused database

\$4000

cost to acquire a candidate

Existing databases of candidates not mined



Retention issues

30%+

employees quit in first 6 months

Poor fit of candidates leads to high turnover/low retention



Recruiters losing time

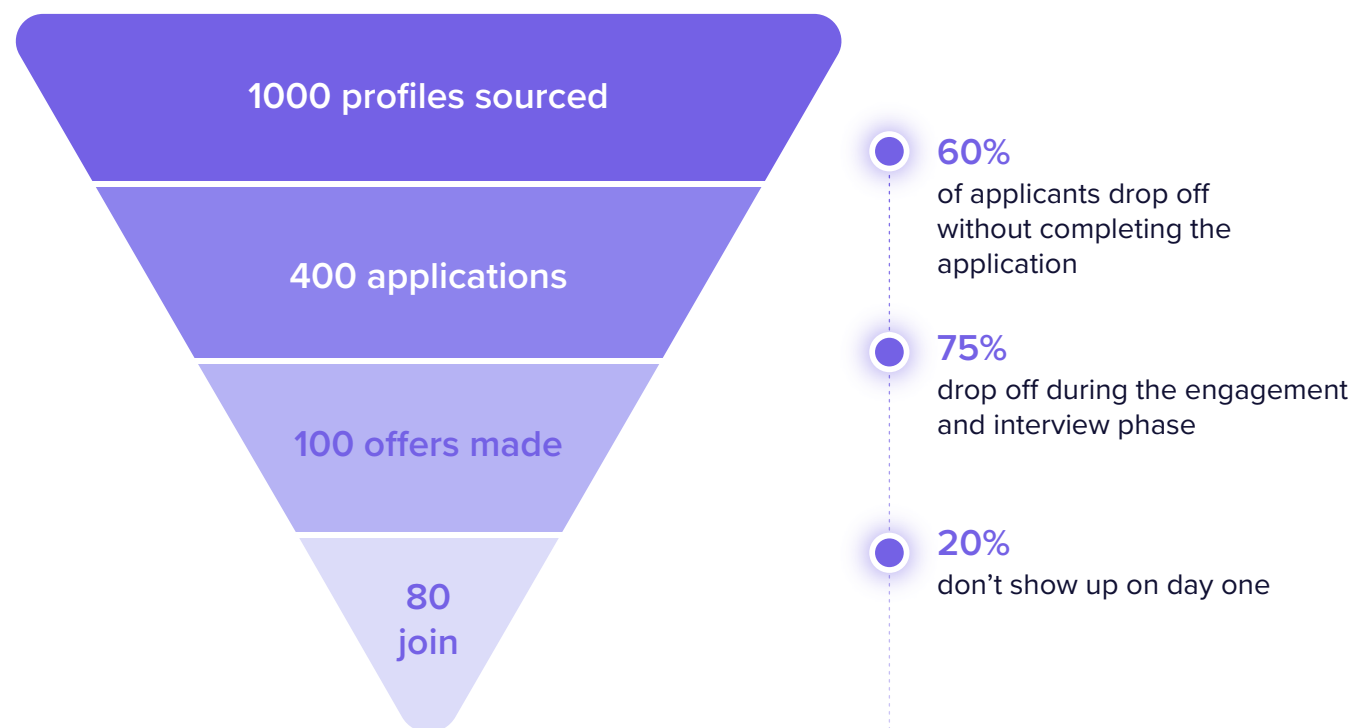
~75%

staff time spend on manual tasks

Recruiters' time burned on manual tasks vs. revenue driving activities

The hiring funnel

is notoriously leaky at every stage, no matter the industry, function or job level

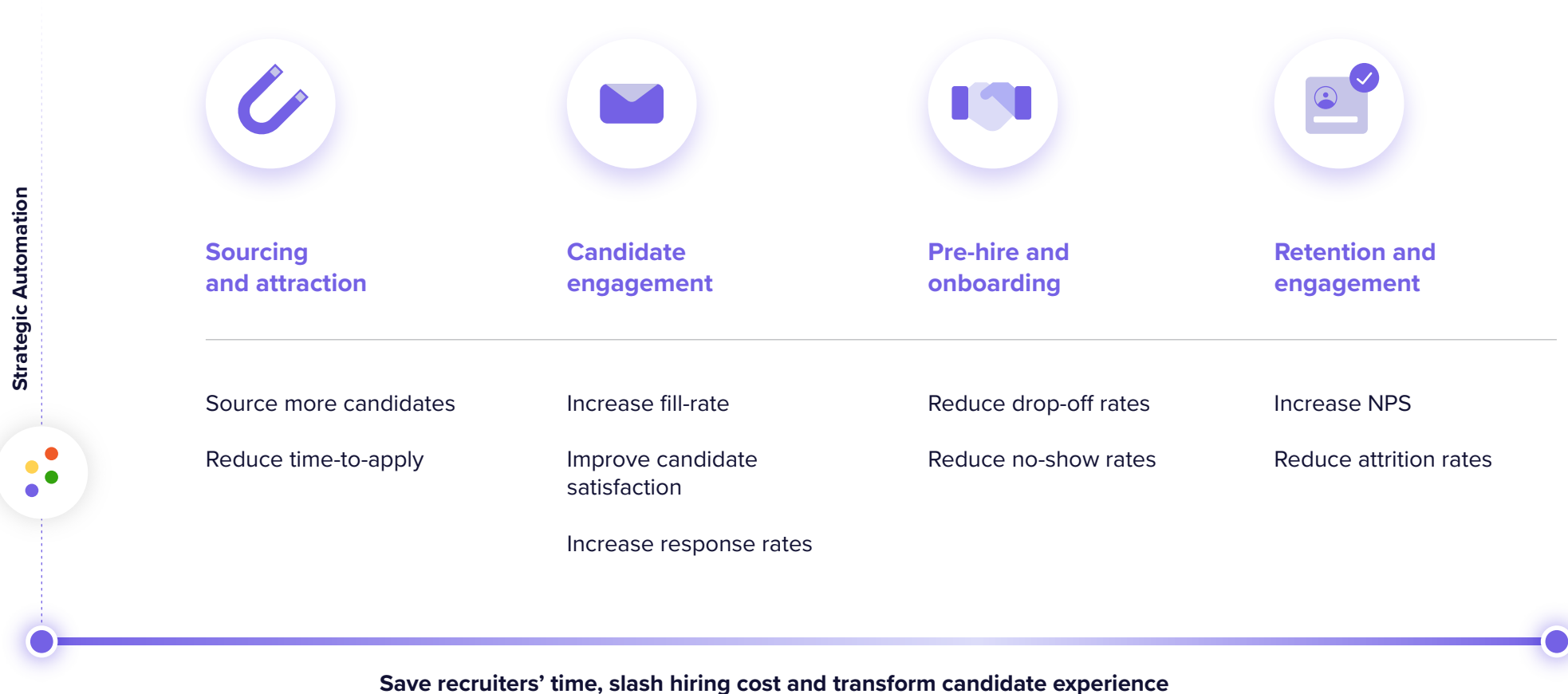


Even marginal improvements at each stage of the hiring cycle can dramatically increase engagement and conversion through the funnel.

We'll show you how to achieve this through **strategic automation.**

Strategic Automation

can drive real results at every stage of the hiring process

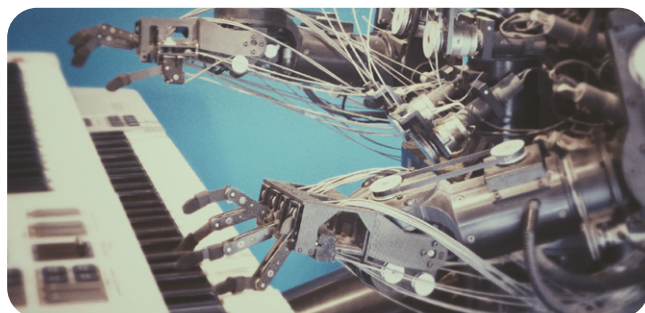


So, what is strategic automation?

At Sense, we like to think of automation on two levels: **standard** and **strategic**. Standard automation is like a dishwasher — it simplifies certain tasks but is pretty limited in scope.

Strategic automation is like an advanced robot vacuum cleaner that maps out your floor plan and cleans every inch, even navigating stairs and self-recharging.

However, the key thing to remember when evaluating a solution or partner is that you don't need to replace your existing tools to drive better results. Solutions like Sense integrate with your core tools—syncing candidate data seamlessly and working in the background to simplify hiring for everyone.



Standard Automation

Automating bits and parts of your hiring cycle

Saves time and improves productivity

Limited scope and customizability

Tactical, small-scale impact

Strategic Automation

Goal-based automation linked to every part of your hiring cycle

Unlocks engagement, candidate experience and retention, in addition to efficiency

Event-triggered, personalized, scalable

Lasting, long-term impact

GOAL 1

Source and attract more qualified candidates

50% of candidate profiles sourced from job boards are already in your database. Yet, businesses spend thousands of dollars every year on these. So how do you get more mileage out of your existing database?

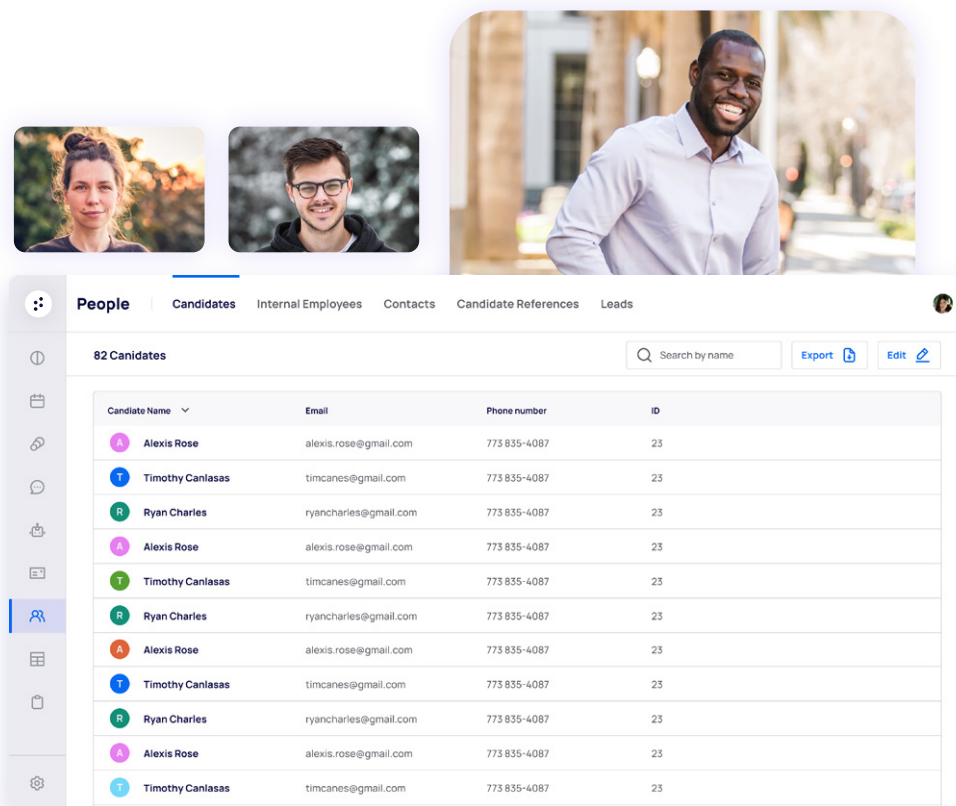
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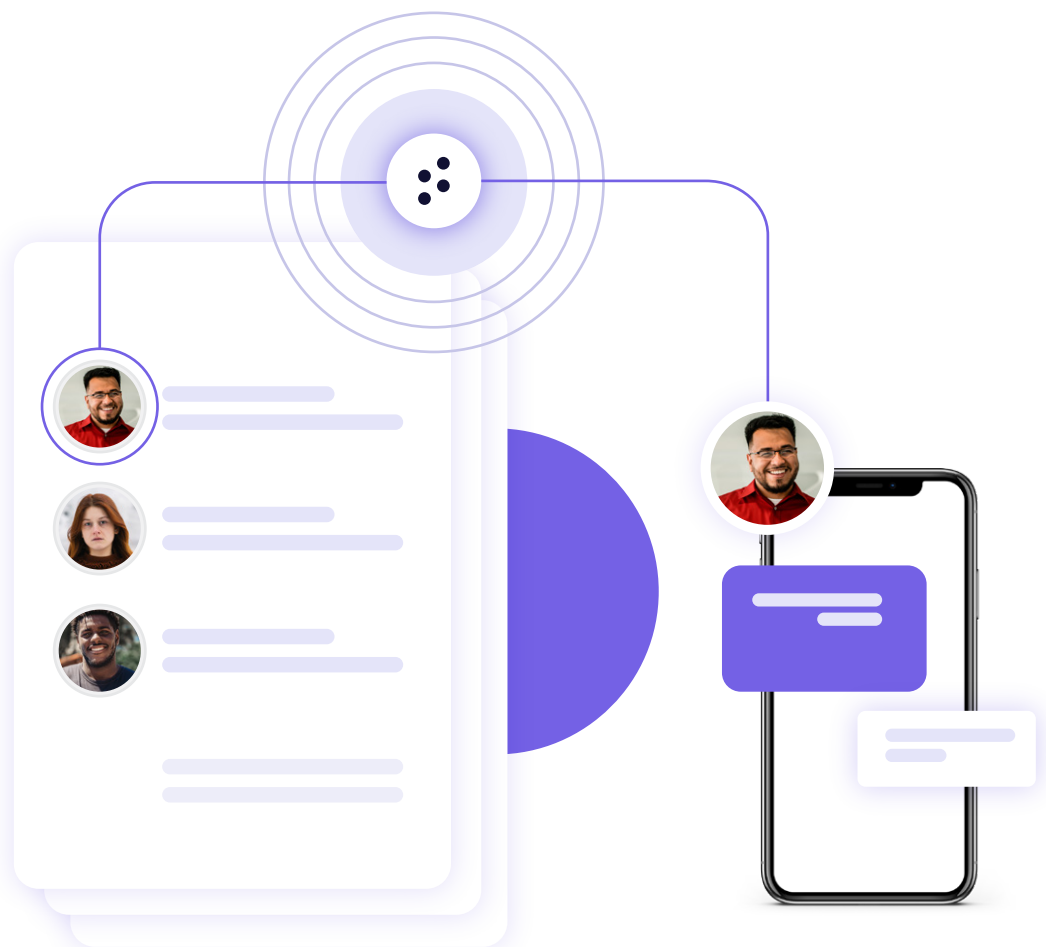
Source better with a self-enriching database

When your recruiting team doesn't trust the data in your ATS, they turn to more expensive, poorly targeted inbound resources like job boards or spin their wheels on time-consuming outbound efforts. Neither of these is scalable or cost-effective.

But **if your database is up-to-date** — and your recruiters have confidence that it's a valuable source — **you can tap into a network of talent you've already paid for, pre-screened, or even hired previously.** Your marketing team will have the tools they need to target candidates with the right opportunities, nurture warm leads, and communicate strategically, so the handoff to recruiting is quick and seamless.

However, the thousands of candidates in your database are constantly changing jobs, skills, phone numbers, and email addresses. **Automation is the only way to keep up with such an ever-evolving talent pool** and maintain an updated ATS.





Database automation turns your ATS into a self-cleaning, self-generating sourcing machine.

When you're using Sense, the process here is simple. Our customers create campaigns that target candidates based on whatever criteria is most relevant (say, date interviewed or something to that effect that otherwise marks a candidate as "passive" or "dormant"). Then, they create message templates to ping those candidates (we find that text works best here, with excellent response rates), asking if their contact information or demographics are up to date.

With automation, you can **reach out to candidates at scale and auto-update or overwrite any field in your ATS** — even previously un-synced fields. Thus, your database is periodically refreshed with accurate, up-to-date information about your candidates.

And when your data is reliable, your ATS will become your recruiters' *first* stop for sourcing rather than the last.

1.2

Rediscover and activate hidden talent

You've spent a lot of time and resources on your candidate database. But **at any given time, most of this database lies dormant**. Some candidates applied but were not interviewed; others interviewed but didn't get the job, yet others refused the job because the offer was not attractive at the time. For whatever reason, they are all inactive.

But now that you have the “what” from automated data enrichment, it's time to get into the “how” of specific roles, skills and opportunities—and move passive candidates into your pipeline.

With recruiting automation tools like Sense Engage, you can segment your database based on the most relevant criteria (for instance, date applied or date interviewed) and springboard automated surveys via inbuilt text or email templates.

Because these surveys are automated, your recruiters aren't spending their days texting potentially thousands of candidates. Instead, they are creating workflows and templates once, and Sense is doing the work in the background.

Here's some of the data you should collect using automated surveys of passive talent: Are they looking for work? Have they added new skills? Has their location changed? What type of role are they looking for?

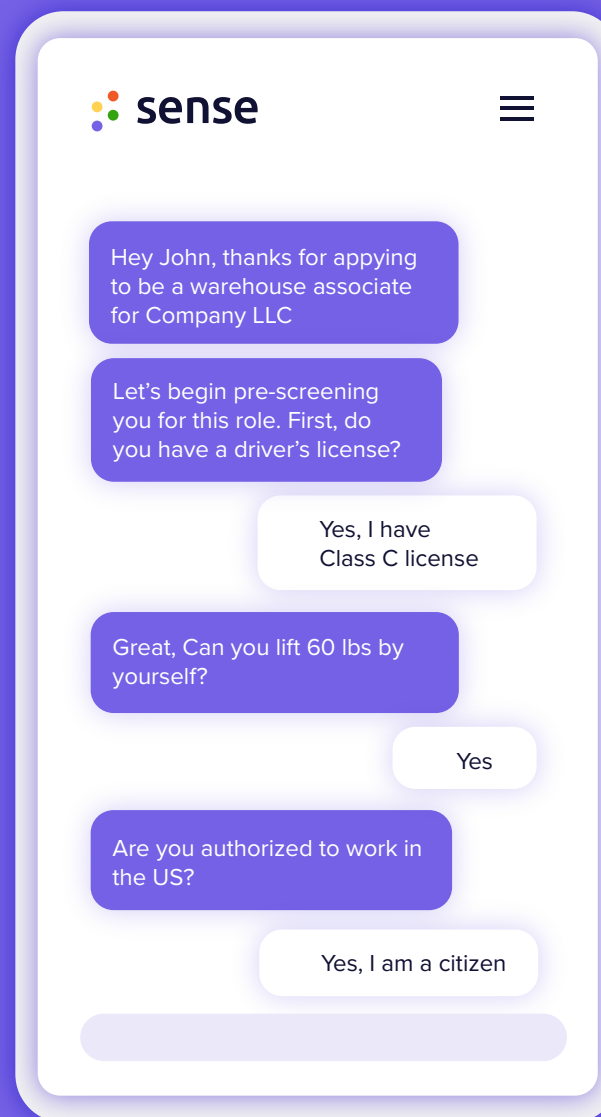
In addition to reactivating dormant talent, there is also a tremendous opportunity to gain referrals through these automated surveys. Not only can these surveys move passive talent into your active pipeline, but they can also add new candidates to your database!

What to measure: Response rates.



Sense Tip

Texting is a highly effective way to reactivate passive talent as the average person checks texts within 90 seconds of receiving them. Texting is scalable, personalized and non-intrusive and delivers a response rate of up to 51%.



See texting in action

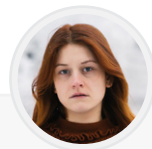
inspired by real examples from our clients



Hey Dan, this is Amelie from FawkesCo. Is your zipcode still 90210?

10:30 AM

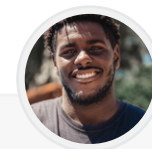
Casual check-in to update location information



Hey Sandra, happy fall! Are you open to new opportunities? We are always looking for good talent.

14:30 PM

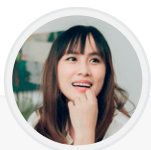
Periodic outreach to gauge openness to new roles



Jamal, happy birthday! Can we still reach you at jamal.sajid@mac.com?

09:00 AM

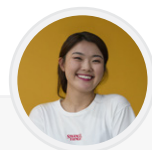
Event-triggered, personalized messages to update email ID



Akia, we haven't touched base recently. Just checking in to make sure all is well with you. Cheers, Bo

16:30 PM

Periodic outreach to stay in touch



Hey Kim, we are hosting a hackathon this weekend. Thought you might be keen. Details here: <link> Let me know if you'll join?

11:30 AM

Event invites for engagement

Sense tip

You could also do this through personalized, automated emails sent to segments of your database periodically. With Sense Engage, we see 2X increased response rates and 2.5X increased candidate NPS.

1.3

Drive more applications with text to apply

Yes, automating your hiring processes is a great way to speed up hiring. But you know what's even better?

Letting candidates apply via text.

Think about it: we are almost always on our phones. Browsing open roles, reading hiring emails, checking Glassdoor reviews, all of it happens right there. So why not let candidates complete their applications easily, quickly from their phones? This goes one step beyond making your application portal mobile-friendly.

Text-to-apply is a game-changing way to let candidates apply to open roles at your company via texting. If you're using Sense Messaging, you'll get a unique phone number that you can include in your job listing. You can ask candidates to text "Hi" to that number.

The moment they do that, the Sense conversational assistant takes over, collecting information such as name, contact, job ID, location, resume, and more. You can even set up a custom flow to pre-screen and schedule candidates (more on this in section 3.2). The application is completed in just minutes -- and the candidate gets a confirmation, while your recruiter gets an instant alert.



More applicants



Completed applications

Sense + HealthTrust

HealthTrust is one of the top 10 largest healthcare staffing providers in the US and serves as a leader in tech and innovation. The team was convinced of the merits of engaging candidates on their phones and had experimented with various texting tools before they tried Sense’s messaging automation platform. What appealed to them wasn’t just the capability to easily text and email candidates — but the ability to do so automatically and reliably while maintaining a human touch.

“We gravitated to the automated workflows, where we could look at points throughout the journey and see where we had opportunities to optimize across our enterprise,” says Cheryl Rhody, AVP of Marketing. And they’ve seen some spectacular results.

98%

Message
delivery rate

900k+

Outbound
messages in 6
months

44%

Response
rate

“*With Sense, we introduced two-way texting everywhere from point A to point Z and saw the difference in response volume and speed almost right away.*”



Cheryl Rhody

AVP, Marketing
HealthTrust

1.4

Generate high-quality referrals through your employees and alumni

The economy is reviving and businesses are hiring aggressively. But everyone is fishing from the same pool of great talent. To find the candidates you really want, you need to get their attention faster than everyone else. Tapping into your employee and alumni network can help you do just that.

First, people continue in the same industry or function for a long time, building strong networks within the space. Second, your employees and alumni really know your company well: they tend to do a pre-qualification before they refer people, making your hiring team's life a tad simpler.

Then, of course, is the ROI for your hiring team. Referrals are far less 'risky' than a completely new applicant and they come at a much lower cost compared to what is currently spent on job boards and social networks.

On the other side, the candidate referred enters the hiring process enthusiastically as they see the employee or alum as a trusted source.



8 out of 10 candidates trust the workplace recommendations of friends and family



Referred candidates are **55% faster** to hire than those sourced through career sites



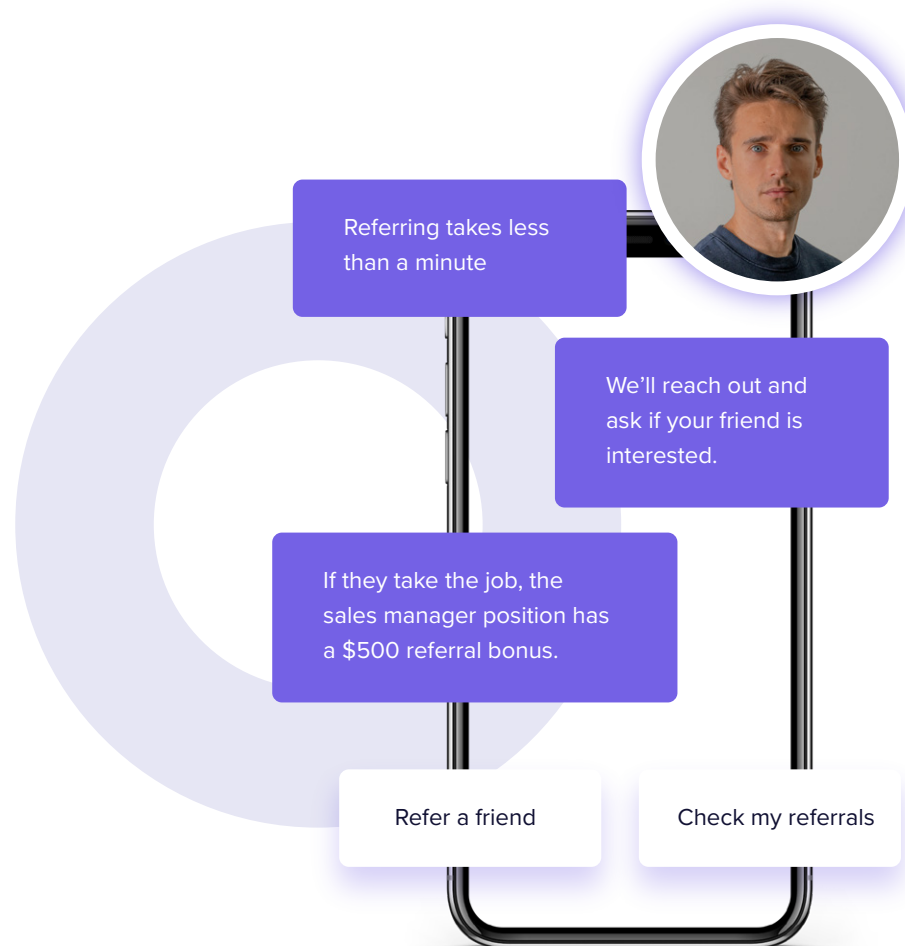
Referral hires have **50% reduced acquisition costs** than other candidates

Balance broadcasts with 1:1 messaging

We recommend creating personalized automated workflows at strategic intervals throughout the talent lifecycle. Using SMS and email, you can set up **triggered communications at key psychological moments** throughout your people's employment journey. For example, seeking referrals from:

- an employee who has just been promoted or recognized for their work.
- an employee or alum who has given you a high positive score in an NPS survey.

Your chances of getting an immediate, positive response are much higher in these cases. When it comes to alumni conversations, keep in mind that some of it should be directed to foster a sense of community so that your alumni feel part of something bigger.



Balance broadcasts with 1:1 messaging

You can do this two ways. One is a broadcast email or text to your entire alumni network about a monthly alumni newsletter or a referral program. The other is focused communication you send to alumni segments based on their location, function, or job role. This would be ideal if you are hosting a networking or hiring event or posting a rehiring opportunity.

Even if your messages are going out to a larger group, **every interaction should feel personal**. If you use Sense Engage to handle this, we leverage your ATS data fields to customize your message. We also make the referral process simple and quick so that your employees can submit referrals and track them in just seconds.



Reach talent on SMS and WhatsApp

While SMS is the preferred text messaging platform for candidates in the U.S., global candidates are most active on WhatsApp.

Using Sense Messaging, you can reach candidates on both SMS and WhatsApp, helping you **expand your hiring funnel and grow your globally-distributed team**. SMS and WhatsApp messages are separated by tabs in the Sense platform so you can easily distinguish between each channel.

Sense Messaging empowers recruiting teams to collaborate on talent engagement.

All text messages are sent from and stored in the Sense platform (not individual recruiters' phones) so everyone has visibility into the conversations that are happening. Teams can also use shared inboxes so any recruiter can reply to a candidate at any time.



55%

*increased
response rate*

3X

*faster
replies*

30%

*increase in
recruiter productivity*

“ We have tripled our referral hires. They not only handle all the behind-the-scenes accounting, but also candidate marketing and engagement automation.”



Molly Shams

VP of Lead generation
The Stepping Stones Group

GOAL 2

Reduce hiring time with increased efficiency

According to SHRM, the average recruiter in the US handles 30-40 open roles at any point in time. In high-volume segments, this number may be as high as 80 at any given time. So how can automation help you mitigate recruiter fatigue?

2.1

Automate up to 90% of your hiring cycle

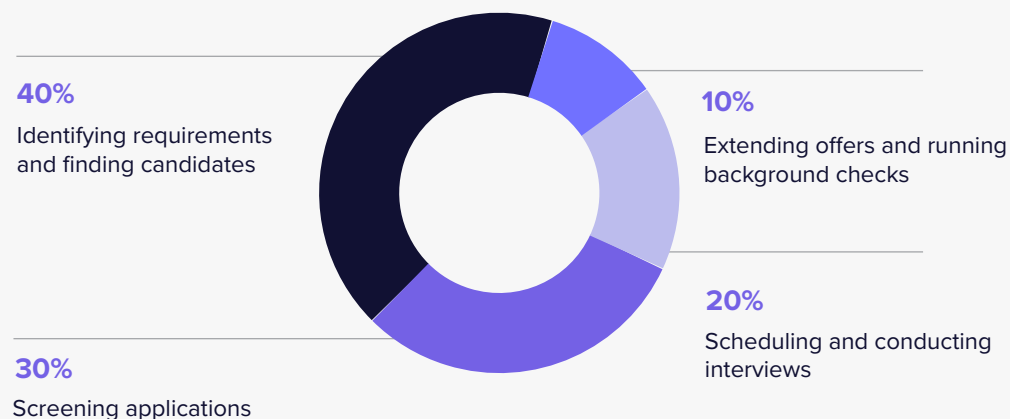
Recruiters typically spend up to 20 minutes per candidate, asking the same basic questions and filtering out unqualified candidates. Multiply this by 20 and you can now imagine what their day looks like!

Thanks to the pandemic, their workload has dramatically increased because active talent pool ballooned 3-4x owing to mass relocations and job losses. **Between data entry and prospecting, two-thirds of recruiters' time is spent on repetitive, manual tasks.**

But, at its core, recruitment is a people business. And your hiring team needs to spend most of their time on people-centric tasks such as connecting with right-fit candidates and nurturing relationships. With AI-driven solutions like recruiting chatbots, you can automate up to 90% of the application and screening process.

If you think of the hiring cycle as chutes and ladders, there are dozens of places where candidates slip through the gaps. But with automation and AI, you can plug these leaks and make your recruiting processes efficient and effective.

Recruiter time spend



What can be automated?



Search and match within ATS



Candidate outreach via personalized messaging at scale



Screening via conversational AI



Interview scheduling

What hiring steps can you automate?



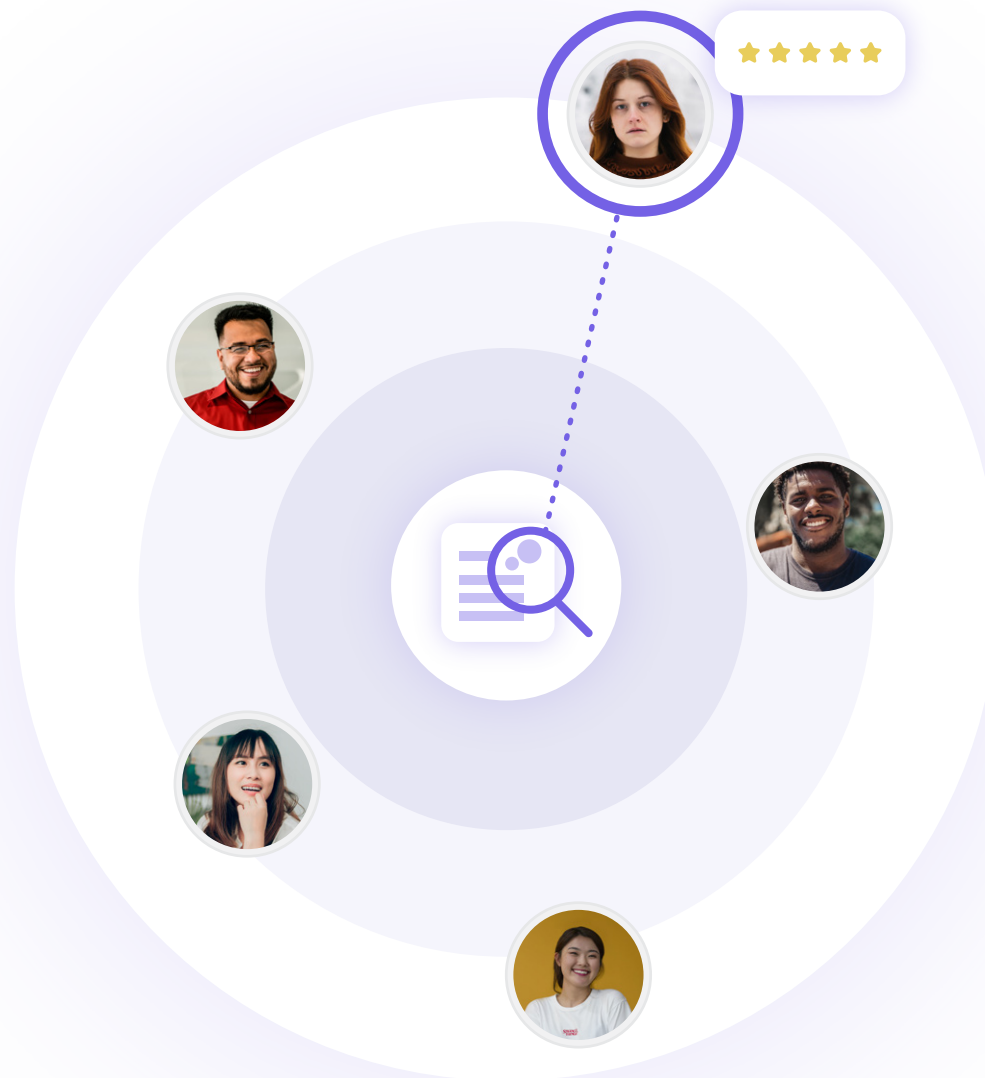
1

Search and match

We've already looked at how automation can help you update and enrich the data in your ATS. With this reliable data, you can use **Sense Discover** to easily run search requests and identify top-ranked candidate profiles for open jobs, thereby significantly reducing your reliance on external job boards.

What to measure:

Quality leads by source



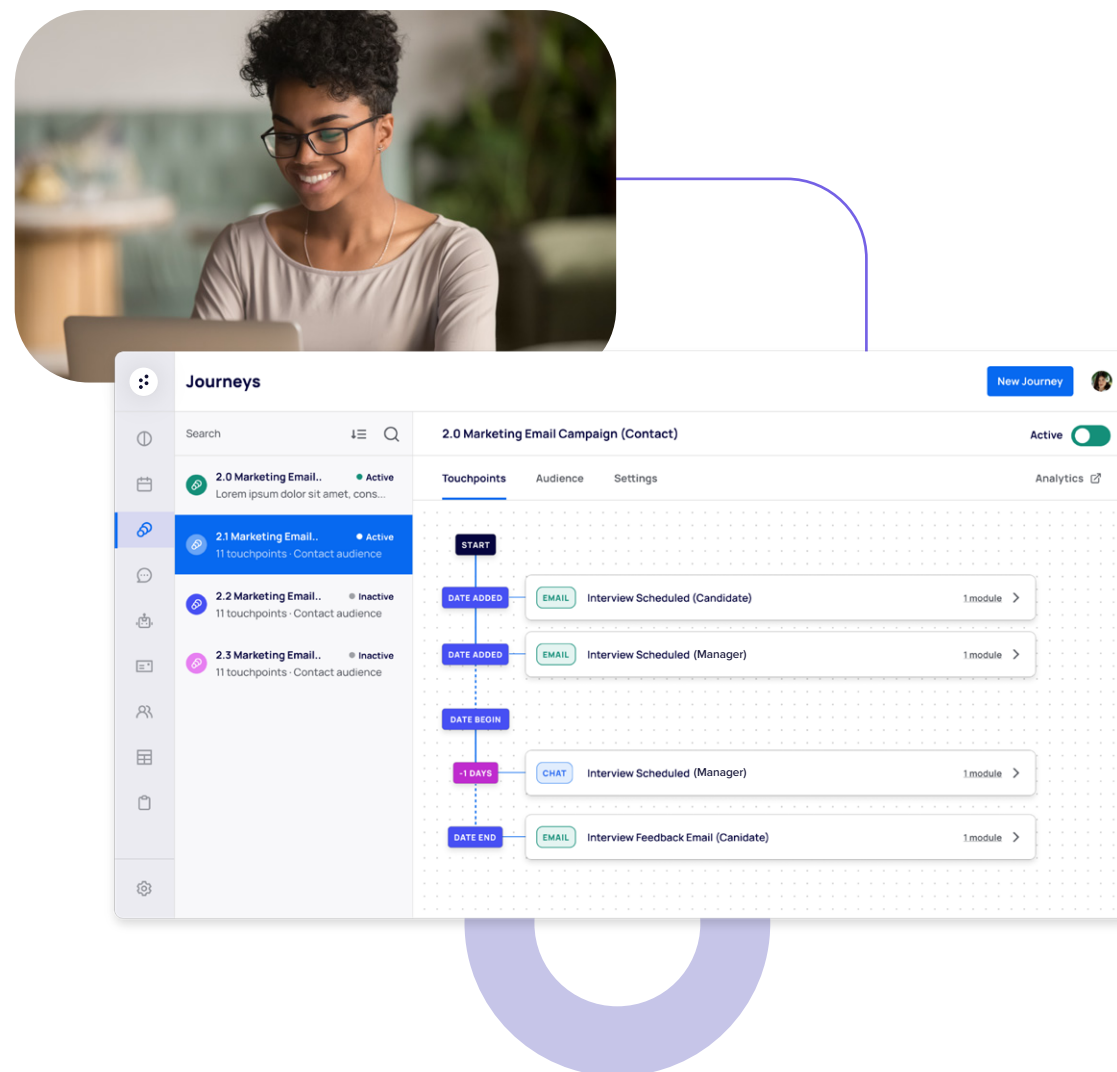
2

Candidate outreach

Once you have a list of candidates sourced from your database, you can automate the outreach process via email or text. Solutions like **Sense Engage** let you trigger branded, rich media messages, reminders, surveys or videos. You also get access to robust analytics to track your ROI.

What to measure:

Response rate



3

Screening with conversational AI

AI-driven conversational assistants such as the **Sense AI Chatbot** can screen top-of-funnel candidates using a custom set of questions based on your predefined criteria (“Are you able to lift up to 50lbs on a regular basis?” “Do you have Javascript skills?” “The pay is \$20/hour. Does that work for you?”), freeing up valuable recruiter time that can be spent on relationship-building with candidates.

What to measure:

Time to apply

Hello, Howard. I'm Reva. I'm here to help

This position is Monday through Friday with the typical shift being 10 PM-6 AM. Are you available and able to work these hours?

Yes, sounds good. I am available.

You may be asked to work at different locations. Do you have reliable transportation?

How much does this job pay?

This job pays \$22 per hour.




4

Interview scheduling

A huge time sink for most recruiters, scheduling is one of the most obvious candidates for automation. Simple scheduling tools help in calendar comparison and blocking based on available hours. But conversational AI chatbots handle all the time-consuming back and forth and even rescheduling, offering a seamless experience for candidates.

What to measure:

Recruiter hours spent on admin activities


Schedule Meeting

2021
 < June >

SUN	MON	TUE	WED	THU	FRI	SAT
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Book a Time Slot


11.00 AM
 Confirm

11.30 AM

12.00 PM

12.30 PM

[Load More Times](#)



Hey Alex,

Your interview has been scheduled for 23 June, 2021 - Monday at 11 AM

Real results, real impact

from Sense customers

55%

faster Hire

30%

*lesser
acquisition cost*

3X

*more qualified
candidates*

GOAL 3

Deliver a stellar candidate experience

According to Indeed, 76% of employers report that they have been ghosted by candidates in the past year and 57% believe it's getting more common than ever. What strategies can you implement to drive a great candidate experience and, thus, combat ghosting?

3.1

Connect with candidates through two-way texting

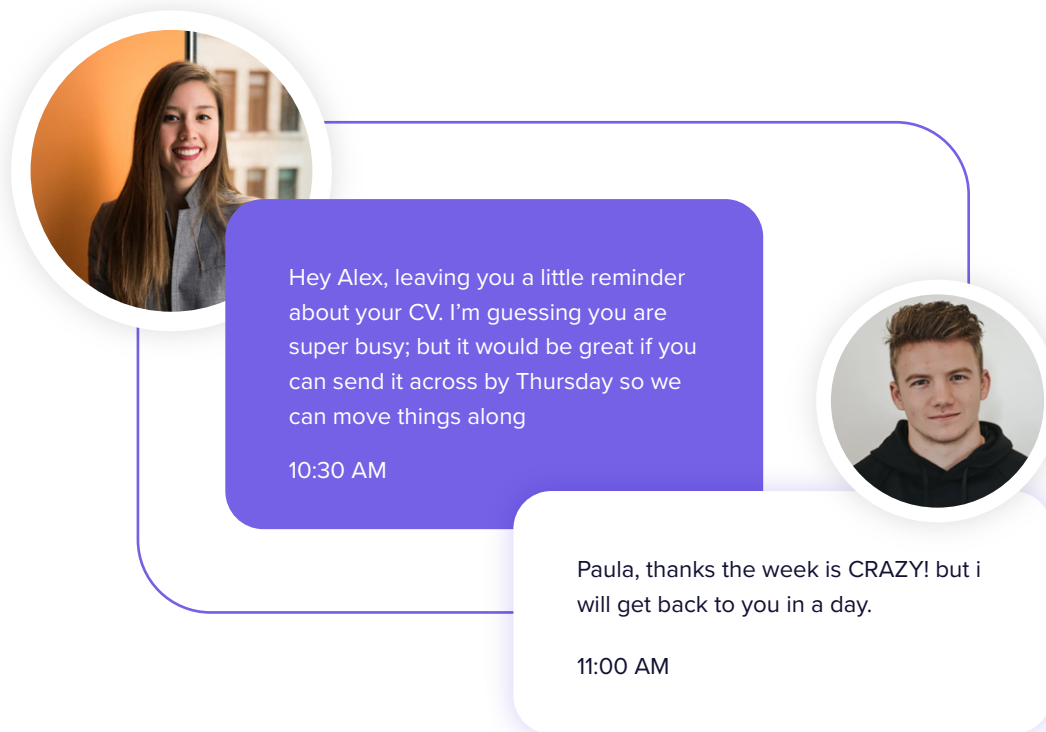
Hiring is an incredibly personal activity both for the candidate and for the recruiter. But given its scale and complexity today, it feels very impersonal. Most candidates feel no connection with employers and find it easy to drop off or ghost them.

You can fix this with two-way texting.

90% of people read texts within 3 minutes of getting them and respond in less than 90 seconds. What a powerful channel this is for recruiters! With solutions like Sense Messaging, you can reach the best talent where they are: on their phones.

Texting can deliver a 51% response rate and make hiring 3X faster.

With Sense Messaging, you can send thoughtfully crafted text messages to candidate segments, personalized with any field from your database: their name, job title, location, skills, etc. You can add emojis and custom signatures so that the texts feel personal. When the candidate responds, you get the replies in a shared inbox from where your recruiter can pick up the conversation.



When should you be texting candidates?

1

When you are hiring

Send out dynamic broadcasts to let your database know about open roles and hiring events. You can target specific segments based on their function, location, any field really.

2

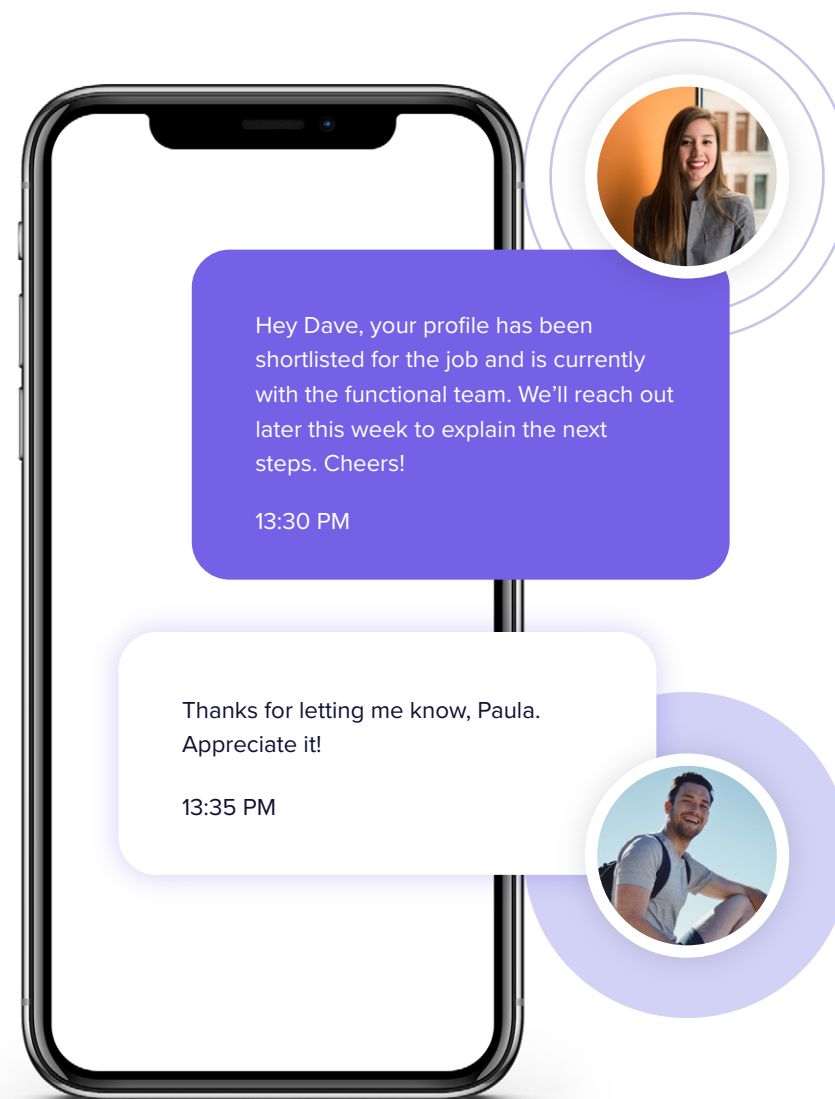
During the hiring process

Texting is a great way to keep candidates in the pipeline updated about their application status. Let them know timelines and next steps. Even 'no update' updates make candidates feel better than thinking their application has gone into a black box.

3

After extending an offer

This is a crucial period, especially if the candidate is evaluating multiple job offers. Staying in touch with casual check-ins and making the candidate feel welcome and valued is a great way to make the right impression and persuade the best talent to work with you.



When should you be texting candidates?

4

When running referral programs

Use broadcast texts to let your employees and alumni know about open roles so that they can refer people from their network. Solutions like **Sense Referrals** let you run entire referral programs, even managing rewards, via two-way texting. We'll get into the details in section 3.3.

5

Even when you're not hiring

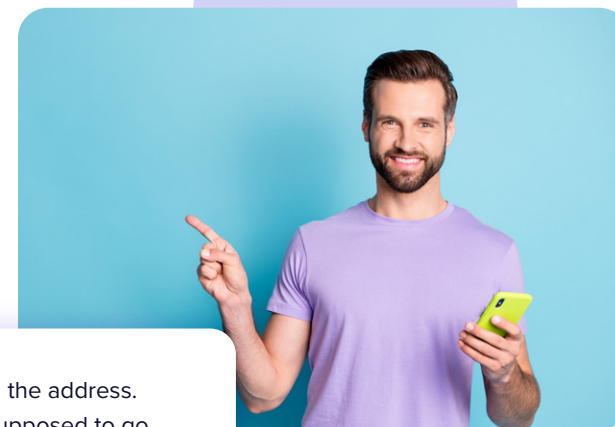
Most importantly, keep your talent engaged through casual text check-ins even if you aren't currently hiring. Staying in touch and building a positive impression will ensure that you have connected, qualified talent whenever you are ready to hire.

Hi Richard, wanted to check in and make sure you're all set for tomorrow.

10:30 AM

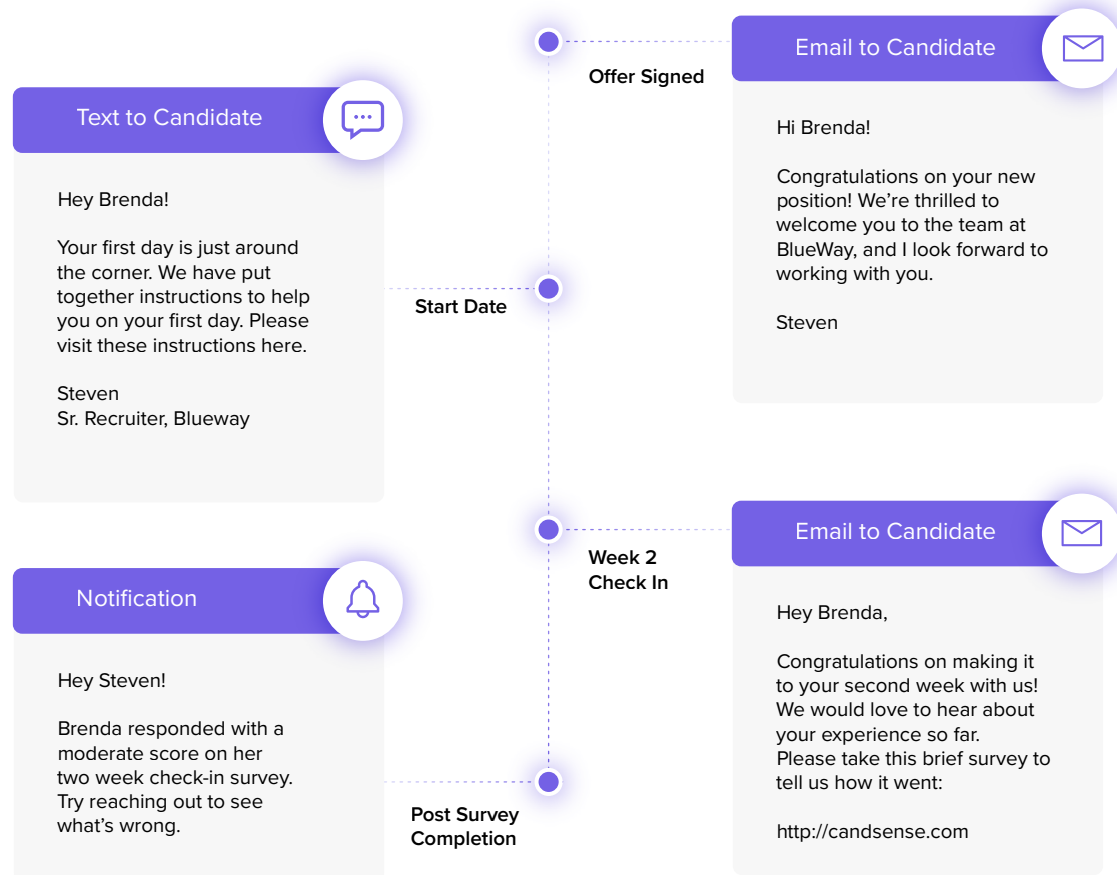
Actually, can you resend the address. I'm not sure where I'm supposed to go.

10:32 AM



Build relationships through custom workflows

To establish rapport with candidates and keep them interested, you need to stay in touch with them at multiple touchpoints during their application journey. Sense's solutions are based on a comprehensive, multichannel approach that let you engage candidates through personalized messages based on application status, time-lapse, specific events and more. As part of these custom workflows, you can even trigger email or text notifications to hiring managers and recruiters about pending tasks or to keep them in the loop.



3.2

Reduce drop-offs and ghosting with conversational AI

For many employers, hiring isn't as predictable as it once was. In a candidate-driven market, drop-offs and no-shows are unfortunately becoming a more recognized—and costly—phenomenon.

While recruiters are stretched thin by heavy workloads - candidates increasingly expect clear, timely communication about the role and the status of their application.

AI-powered conversational assistants can solve this problem and cut your time-to-hire **by as much as 55%**.

Let's see how.

Andrew, Thanks for applying to the Caddy Manager role! We have a few more questions to confirm a great fit. Are you interested in continuing the conversation?
Txt Yes or No

10:30 AM

Yes.

10:32 AM



A tale of two hires



Scenario 1



Dana Lee is a Sales Manager who's just visited your website and applied to an open position. You'd hire her in a minute if you spoke to her - but it's a Friday and her application is buried under hundreds of others.

7 days later

Dana drops a follow-up email when she is off work. Unfortunately, it's Friday evening again.

3 days later

Your recruiter Tam spots Dana's application, evaluates it and moves it to the shortlist pile.

1 day later

Tam calls Dana but she is at work and does not answer.

3 days later

Tam tries again. But by this time, Dana has heard back from other places she's applied to and is no longer interested.

Time taken **14 days**

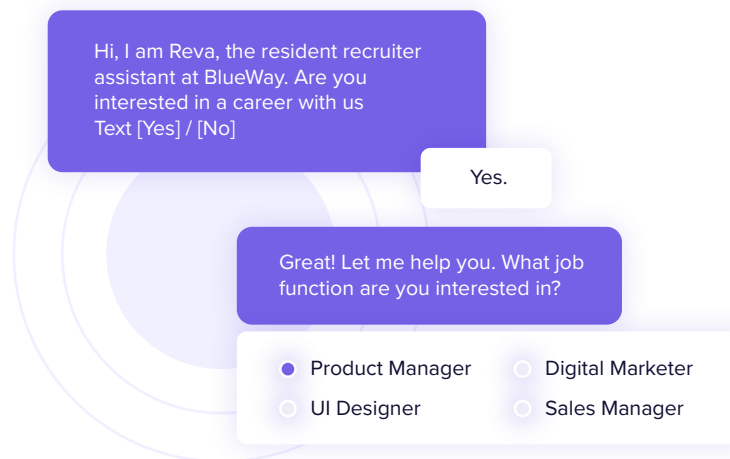
Hiring Status **Failed**



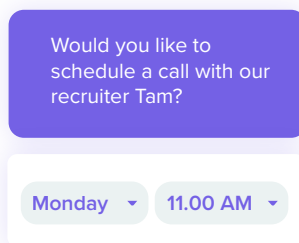
Scenario 2



Dana Lee is a Sales Manager who's just visited your website on a Friday evening. She's browsing current openings. Suddenly, she gets a pop-up message.



Reva screens Dana for her skills, experience and interests with a set of custom questions -- and finds an immediate match!



Dana selects a time and date, and gets an immediate text notification, confirming her call with Tam on Monday at 11 AM.

Dana's application is complete. Reva has tagged Dana as a shortlisted candidate and triggered a priority email to Tam

Total time taken **15 minutes**



You know how this ends, right? Great candidate experience and fast hiring, delivered by AI-powered recruiter assistants and 1:1 texting.

Sense + MissionStaff

MissionStaff, founded in 2003 by career staffing leader Brett Pinto, is a key player in the digital marketing, creative and technology recruitment space. “I was getting feedback from both my recruiters and client relationship managers that people just weren’t picking up their phones anymore,” Brett says. “They’d leave voicemail but calls were rarely returned.”

Brett discovered Sense while at a conference evaluating texting vendors. “The Sense product blew me away,” Brett says. “I did a quick demo and was pleasantly surprised to see that the message I received looked like any other text message. It was also effortless to send from your computer.”

After talking more with the team, Brett was sold on Sense because of how different it was from a point solution texting product. “I was just looking for a text messaging tool, but Sense showed me how I could build workflows for delivering touchpoints throughout the candidate lifecycle. That was a game-changer.”

63%

Response
rate

\$600k

additional
revenue from
placements in
year one

30%

Reduction in
candidate
issues

“

We had a difficult role to fill for a demanding client and were able to quickly identify a candidate in our database, but he was on a train. Because he received our text and replied immediately, we knew he was still available. That candidate would not have answered his phone given the circumstances and noise. The text worked like a charm.”



Josh Wieller

Delivery Lead
MissionStaff

***You're sold.
What next?***

Make a strong business case for recruiting automation

- *How do you convince your stakeholders about the many benefits of automating your organization's recruitment processes? Here is a step-by-step approach.*



1

Start by addressing basic concerns

Automation and AI are words that raise a lot of basic questions. Will candidates be talking to bots now? Can AI really replace human decision-making? On the other end of the spectrum, some folks may think automation will transform your numbers overnight. As the evangelist for the project, you will need to address both the skeptics and the idealists right in your early conversations and set clear expectations.

2

Pitch the right message

When making your case, **consider both the short-term and long-term impact** on your business. Let's take chatbots as an example. In the short term, they improve turnaround time by being available 24*7 and doing the first level of screening. In the long term, they help you engage your employees and do regular NPS checks.

Choose the right hook for your pitch — immediate solution for a current problem vs a futuristic, long-term view — based on your business priorities and goals.

3

Present relevant ROI projections

Different metrics matter to different stakeholders. HR leaders will see value in higher conversion rates and greater employee productivity. Business leaders will want better quality of talent and higher employee engagement. IT leaders will want to ensure seamless integration of new tech with their existing tools and platforms. Finance will prioritize cost-reduction and compliance.

To make a successful pitch, you need to show how automation will move the needle for every function. This is where data becomes your friend. Collect current numbers for your organization and work with your automation partner to build post-implementation forecasts.

4

Start small, learn lessons, scale quickly

A pilot is the most important part of the engagement. You establish early working practices with your automation partner, set and track realistic milestones, and smooth out hiccups.

We recommend **creating a core team for the pilot with representatives from every stakeholder group**.

Together, you can define what the MVP will look like: the must-haves, the good-to-haves, and the for-laters.

Work with your automation partner to **establish clear goals and metrics that will be tracked during the pilot**, which typically runs from 3 to 6 months. Keep the core team involved and communicate progress and challenges regularly.

“Ask yourself: what things would be better if they were done 24/7? What would be better if it were done at scale? What would benefit from greater consistency? What would be possible if we leveraged broader expertise to see beyond our current limits? These are good candidates for AI.”



Deborah Bubb

Chief Talent Officer
United Health Group

Your Recruiting Automation checklist

What to look for when you are evaluating automation solutions

Source more qualified candidates



Website digital recruiters

Engage with 100% of candidates directly on your website. Collect their experience and preferences, and use preference-based job matching to present relevant job opportunities



Automated referral campaigns

Launch and scale referral campaigns and enable employees to submit, track, and pay out referrals in seconds



Field updates/writebacks

Source candidates from within your database by first keeping data clean and accurate. Automatically update field values from survey responses, data age, or online behavior and write back data to the ATS



Built-in, automated surveys

Intelligent surveys that capture work availability, upload resume, prescreen candidates etc.



Event-triggered enrichment surveys

Leverage chatbots to collect follow up information from candidates, saving recruiters thousands of hours and enriching candidate profiles at scale

Your Recruiting Automation checklist

What to look for when you are evaluating automation solutions

Reduce time-to-hire



Automated screening chatbots

Automatically screen high volumes of applicants with customizable questions



Text to Apply

Attract candidates anywhere by letting people apply to job positions via text



Custom, broadcast messages

Send multiple broadcast messages to hundreds of contacts at once.



Self-scheduling and rescheduling

Let candidates select their own date/time and can even self-reschedule if needed before their interview. With notifications

Your Recruiting Automation checklist

What to look for when you are evaluating automation solutions

Increase candidate engagement and personalization

- ☐ **Two-way texting**
Seamlessly operate between automated texts and 1:1 texts between recruiters and candidates, and leverage templates to easily personalize messages
- ☐ **Dynamic variables/tags**
Personalize every communication using field values directly from entity records and dynamically use information relevant to the candidate or client
- ☐ **Visual, multi-channel journey-builder**
Easily create automated workflows with zero code
- ☐ **FAQ chatbot**
Provide candidates with instant support and remove burden on recruiters by answering frequently asked questions via an automated solution
- ☐ **Built-in NPS surveys**
Track NPS over time and correlate with engagement and response data to uncover drivers that annual surveys miss



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