The Candidate Sourcing Software Checklist

> 70% of talent leaders recently told us that their #1 priority right now is building talent pipeline. Nearly 60% are investing in sourcing tools and tech this year for that reason. This checklist is for that majority of you who are currently looking for the right tool to support your sourcing efforts.

Prospective candidate sourcing software can have an incredible ROI. It streamlines workflows, multiplies outreach, reduces time-to-hire and cost-per-hire, improves workforce diversity and candidate quality, gives you analytical insights to optimize your process, and improves candidate experience and builds employer brand in the meantime. But you've got to find the solution that's right for you in order to see that return on investment.

For that 60% of talent teams exploring your candidate sourcing software options right now, here's a 3-step process for making the best decision:

Step 1 – Define Your Goals

Determine what you're trying to achieve with your candidate sourcing software. What are your talent acquisition goals and priorities—especially as they pertain to the top of the funnel? Here are some examples of priorities we often hear:

- You need to implement and track diversity hiring initiatives at the top of the funnel (the only part of the funnel you can control) to invigorate your business

- You need to increase productivity-per-resource through things like automated email-finding, automated follow-ups, and auto-capture of prospect data

- You need to be able to comb a database of prospects with Boolean filters and advanced search parameters to uncover strong candidates from previous searches

- You need software that integrates with your ATS for ultimate visibility into each of your hiring funnels and where candidates are in each stage of the process

What are your goals?

1. _____

2. _____

3. _____

It might help to sit down with your team/s and document their process. Map out every step. What tools are they using? How are they tracking touchpoints, staying organized, and following up? Ask them to walk and talk you through their workflows. What do sourcers and recruiters say *their* biggest pain points are in these processes?

Step 2 – Candidate Sourcing Software Checklist

Use this checklist to ensure the solution you choose has all the capabilities you'll need:

☐ **Automatic Data Capture.** Whether that means auto-populating fields with LinkedIn (or GitHub, or Facebook, etc.) data; tracking email sends, opens, and responses; providing email addresses and social links; auto-logging InMails; or syncing touchpoints to the ATS; your solution should take as much research and data entry off recruiters' hands as possible. Ask what manual activities the solution relieves you of.

☐ **Segmentation.** A good sourcing solution lets you segment prospects and candidates into discrete talent pools (location, role, skills, education level, and other demographics) for outreach and nurture campaigns. After all, an engineer will be interested in different content and events than a VP of sales will be; likewise, college students and veterans require different messaging. With these categories in place, you can send talent pools into different workflows, improving both the personalization and the relevancy of your outreach.

☐ **Email Templates and Bulk Emailing.** Choose a solution that allows you to build out messaging with the help of tokens that auto-populate for each person in that talent pool when you hit "Send," resulting in outreach at scale without sacrificing personal touch. Otherwise recruiters have to cut-and-paste messages and click a separate "Send" button for every email.

☐ **Mail Scheduling and Sequencing.** A good sourcing solution should allow recruiters a set-it-and-forget-it mentality: they can build out nurture sequences, schedule the emails to go out one at a time in the coming weeks or months, then move on to their next project.

☐ **Follow-up Reminders.** If a prospective candidate says they'll be ready to chat in six months, recruiters should be able to set a reminder in the software to go off six months from now—or even schedule an email *now* to go out in six months, while it's top-of-mind.

☐ **Search.** No one wants to grapple with their software to unearth a candidate. Your solution should allow you to search your entire candidate database by attributes such as role, location, education, skills, and more. It should also allow you to conduct Boolean searches (keywords + "AND," "OR," "NOT"), search candidates using multiple criteria, and save your favorite searches so you don't have to recreate them every time a role reopens.

☐ **Notes.** A good sourcing solution will log recruiter behavior and interactions with candidates; but you'll want a place for recruiters to leave more detailed notes about those interactions. For example: why isn't the candidate willing to consider a new role right now, and when *might* they be? A complete candidate history means better visibility— and a better candidate experience.

☐ **Collaboration.** You can't have a successful recruiting and hiring process if your team can't effectively review prospective candidates with hiring managers or see a candidate's history with your company. Look for a solution that gives you visibility into which teammates reached out to prospects—and when—so you're not diminishing your talent brand by over-contacting them. Look for a solution that allows leadership to participate in prospect outreach through aliases or send-on-behalf-of (SOBO). Look for a solution that connects the right stakeholders with the information they need and allows them to discuss, rate, and otherwise communicate about candidates through the platform.

☐ **Data and analytics.** Your solution should generate custom reports, dashboards, and charts based on data, so sourcing leads, hiring managers, and talent ops can get a birds-eye view of both the state of hiring and the top of the funnel, and so individual sourcers can shift strategies where needed. Look for outreach stats so you can track engagement through open, click, and reply rates, as well as what content is resonating most with talent. Look for activity views so you can see where recruiters are spending their time. Productivity reports help you observe bottlenecks, identify top performers, and replicate and scale their habits. Look for diversity stats, so you can see what gender and race/ethnicity looks like at the top of the funnel.

☐ **Integrations with your CRM, ATS, email, events platform, and careers page.** The whole point of sourcing software is to streamline, and get visibility into, your process from the very top of the funnel. But that won't happen if the software doesn't talk with your other solutions. The most efficient sourcing software integrates with your ATS so you can access every person

who has historically identified in some way with your company, search for former silver medalists, segment and reconnect with them. It integrates with your email, where so many touchpoints occur before prospects are ready to apply. It integrates with your events platform so information can be auto-populated when talent RSVPs to events. It integrates with your careers page so when prospective candidates sign up to join your talent community, their information is *also* auto-captured.

Step 3 – Know What Additional Questions to Ask

If, after you've scanned the market, you've narrowed it down to a few remaining vendors who can support the above needs, you'll need to evaluate and compare. If you haven't asked for demos yet, *now's* the time to do so. A demo will help you see whether the reality looks anything like what the provider has promised. It'll also get you the answer to one of the most important considerations: *Is the solution intuitive and easy to use*? Don't forget to ask these important questions:

☐ **Do you have success stories from orgs and teams of my size / in my industry?** Different forms this question might take include: How many recruiting teams use your product? How many recruiting *agencies* use your product? Can you provide customer case studies? Can you provide references?

☐ **How long does implementation take, and how long to get recruiters up-to-speed?** Find out what the provider's average implementation time is. Do they have documented success of implementation with current customers? If they promise to have the solution implemented by a certain date, but can't deliver, what happens?

☐ **What does training and customer support look like?** What's the extent of the provider's training for current recruiters? For new recruiters down the road? Do they provide additional training when new features are released? How can you contact them if you run into a problem? Through what channels? What's their average resolution time?

☐ **What security measures have they taken?** Your provider should be SOC 2 Type II compliant, support SSL (https://), use encryption for data transfers and passwords, and set limits on what information can be collected. Are they GDPR compliant? Do they have standard processes in place for disaster recovery?

☐ **How often do you release new product features?** Ultimately, you want to be working with a sourcing software provider that's investing in consistent improvements to the product. So ask about their product roadmap, dig into the strength of their engineering team, and figure out whether they're willing to prioritize your feedback and grow with your team's evolving needs. Find out how often they build out new functionality and how often they release system updates.

☐ **Are there hidden fees?** Hopefully your provider of choice is up-front with you and their pricing plan is straightforward. But to avoid future headaches, ask about setup fees or implementation charges, support fees, integration partner fees, integration partners' support fees, and taxes. What's the cost of adding new seats? Remember: You want a solution that can scale with your business, and that you can continue to afford as you grow.

For more detail on best practices for selecting candidate sourcing software for your org, download the full Buyer's Guide to Prospective Candidate Sourcing Software.

To learn more about how Gem can automate your outreach, help build and diversify your talent pipeline, and offer your team data-driven insights, visit gem.com