WinSearch Placement Process – Start to Finish

Candidate

↓

Candidate Calls In

Candidate

↓

Candidate Emails Resume

Candidate

↓

Contact Candidate for Position or Update

Candidate

Candidate

Candidate Identified in Social Media (i.e. LinkedIn)

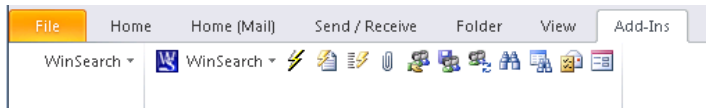⌨ This symbol identifies other training videos that cover this topic in depth.

Adding Candidates

Click the New Person toolbar button (⛐), type their information and click the Save toolbar button (💾).

⌨ WinSearch 101

Adding Candidates From their Emailed Resume
Click the lightning bolt or paperclip in the WinSearch toolbar in Outlook or Word.


Adding Candidate From Referral
Click the New Person toolbar button (⛐), type their information. For Source, don't forget to put Referral and/or name. Can put Name in the notes or a user-defined field. User-defined field can track whether referral bonus is paid.

Adding Candidates From Social Media
Click on the web page just to the left of their name. Scroll down through the page and hold down the ⎗Shift⎘ key while you click the end of the text. Switch to WinSearch and click the New Person from Clipboard toolbar button (⛐). For sites like LinkedIn, consider taking their link and adding it to a user-defined field.
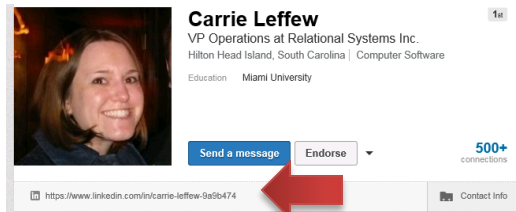
For all candidates: Review What Entries are Needed

- Status
- Type
- Class
- Source
- User Defined Fields
- Key Words
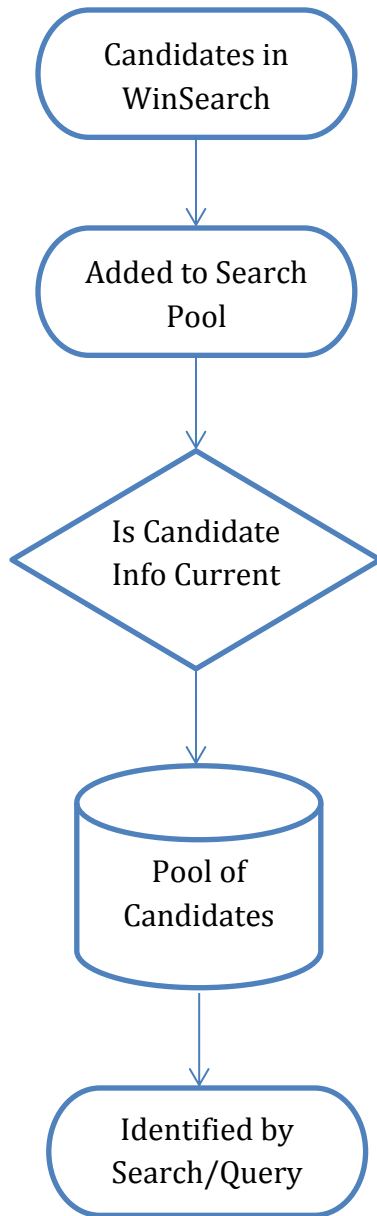
Keeping Candidate Info Up-to-Date

Searches to identify candidates not periodically contacted:

1. Open Persons table
2. Select Query | Advanced SQL Server command.
3. Paste text below into main box:

   UPDATE_DATE<@SYSDATE-365 and ID NOT IN (SELECT ENTID FROM ACT_ENTITIES WHERE ENTTYPE='PER' AND ACTID IN (SELECT ID FROM ACTIVITIES WHERE DATEUPDATED>@SYSDATE-365)) and category<>1 and staff_rep=@USER

4. Click Execute

🖥 Memorized Queries

Sending Blast Emails

1. Pick people with QBE, Advanced query or Search.
2. Click Send Email toolbar button (📧)

🖥 WinSearch Email Basics

Create Next Contact Activities

- Create an Activity (✅) OR
- Use Create Next Contact Activity toolbar button (📅)

🖥 All About the Daily Planner

Matching Candidates to Position to Fill

Methods include:

- Searches
- Saved Lists
- Queries
- Lookup by name with F3 or 👥

🖥 Searches & Queries

Candidates in WinSearch

Added to Search Pool

Is Candidate Info Current

Pool of Candidates

Identified by Search/Query

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```
Identified by
Search/Query
        │
        ▼
  ◇ Does Sales
    Need to
    Review ◇
        │
        ▼
  ◇ Internal
    Interview? ◇
        │
        ▼
  ◇ Is
    Candidate
    Interested ◇
        │
        ▼
  Submit Resume
    to Client
        │
        ▼
  ◇ Is Manager
    Interested
    ? ◇
```

Activities can be created for each step:

Does Sales Need to Review – If Yes, then the recruiter creates an activity with a notification for the sales rep. Sales rep puts into activity notes whether candidate continues or why candidate doesn't fit.
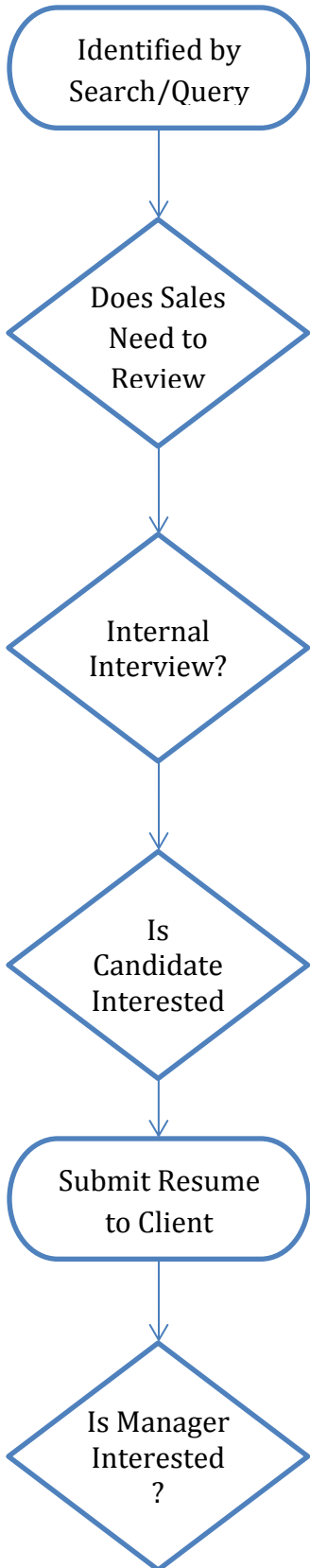
Is Candidate Interested – If done by email, send an email either individually or as part of a blast. Their response determines whether they continue. If done by phone, the Phone Call activities can be set up en masse or individually. When setting up phone call activities en masse, use the Save As Individual Records check box. You also want to remove any hiring manager links from this activity.
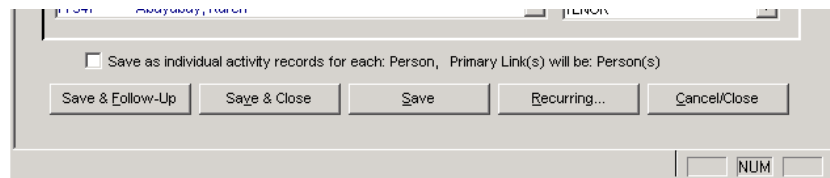
Internal Interview – Set up an activity for this purpose when your company does a preliminary interview to determine the candidates aptness for the specific position as well as general fit for the positions that you fill. When the interview is over, mark the activity completed. Don't forget to put your notes into the activity for later reference.

Submit Resume to Client – If done within an email in WinSearch, start the email from the job order or a search tied to the job order to get the job order included. When you create the resume submittal, go ahead and create the ...

Follow Up With Manager – Whether this is a specific activity code or a general Phone Call one is decided by your company. This activity becomes complete when you get an indication for whether the manager wants to pursue this candidate or pass on them. If so, time to set up:

```
┌─────────────────┐
│ Manager Interested │
│  in Candidate    │
└────────┬────────┘
         │
         ▼
┌─────────────────┐
│  Schedule Phone  │
│    Interview     │
└────────┬────────┘
         │
         ▼
┌─────────────────┐
│  Follow Up After │
│  Phone Interview │
└────────┬────────┘
         │
         ▼
┌─────────────────┐
│ Schedule In-Person│
│    Interview     │
└────────┬────────┘
         │
         ▼
┌─────────────────┐
│ Follow Up In-Person│
│    Interview     │
└────────┬────────┘
         │
         ▼
┌─────────────────┐
│  Negotiate Offer │
└────────┬────────┘
         │
         ▼
┌─────────────────┐
│      Offer       │
└────────┬────────┘
         │
         ▼
┌─────────────────┐
│    Placement     │
└─────────────────┘
```
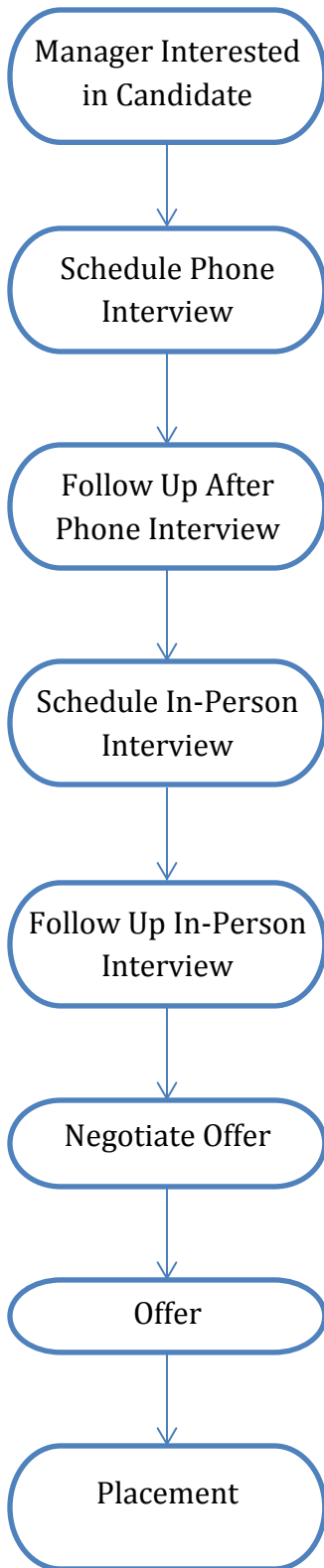
Phone Interview – This type of activity is created as you start setting it up. Once the date and time are agreed upon, consider turning on an alarm for an hour or two beforehand to contact the candidate to verify their preparation. Marking this activity complete occurs when the interview completes.

Follow Up From Phone Interview – Feedback from the Phone Interview depends upon whether a separate activity is used. Whether one activity is created or you create one for the candidate feedback and one for the contact feedback is a business decision. Ideally, this activity/activities is marked complete as you create a …

In-Person Interview – This type of activity is created as you start setting it up. Once the date and time are agreed upon, consider turning on an alarm for an hour or two beforehand to contact the client and candidate to verify their preparation. You may also have prep call activities for candidates and managers depending upon the lead-time and situation. Marking this activity complete occurs when the interview completes.

Follow Up From In-Person Interview – Feedback from the In-Person Interview depends upon whether a separate activity is used. Whether one activity is created or you create one for the candidate feedback and one for the contact feedback is a business decision. Ideally, this activity/activities is marked complete as you create a …

Offer & Offer Negotiations – This may be a separate activity, Phone Call activities or part of the feedback from the Interview. Once both the candidate and manager agree and any contract is signed, you are ready for …

Placement – You have scored!!! When a Placement activity occurs, WinSearch has special options for updating information on the job order and the candidate as well as creating Back Office data for tracking placements.

    🖥 Placement Activities and the Back Office
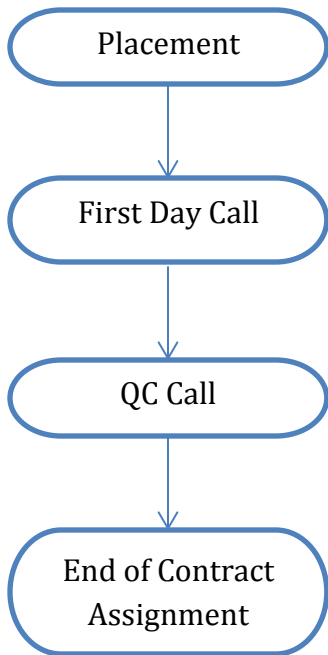
After a Placement is made, here are some of the activities you may want to create and track. Chances are, you even want to create them at the time the placement is made to verify that they are not overlooked.

First Day Call – This makes sure that the candidate shows up and doesn't get cold feet. If there is a period of time between when the offer is accepted and when the candidate starts, consider an alarm a few days beforehand to verify that the candidate is ready to start.
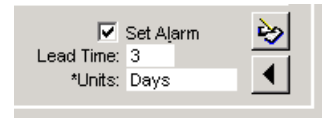

QC Call – When the guarantee period is getting close, doing a QC call can make the difference between getting the placement fee and getting a dose of frustration. This also becomes a valuable time for getting referrals, even if it is as simple as asking "Do you miss anyone from your old workplace?" When you complete this activity, you can use Save & Follow Up to create a subsequent QC Call or a Phone Call for staying in touch with your candidate.

End of Contract Assignments – You actually want to set this to occur and have an alarm before the contract ends. After all, contract extensions means you really found the right person for the job. Without an extension, you also want to consider what current openings this candidate can fulfill. Thus, this activity gets completed when the job ends. Don't forget to put in the notes how well the candidate did so you can better place him in future jobs.

Placement

First Day Call

QC Call

End of Contract Assignment

Activity Setup

The steps along the business process include a lot of activities. As a reminder, SYSADM sets up the activities that your company uses. SYSADM uses the Settings -> SYSADM Options -> Activity Code Setup.

When setting up an activity, you can help make one activity flow to another by entering a Follow Up Activity as shown below. This sets the next activity that gets created when you choose the Save & Follow Up button when saving an activity.
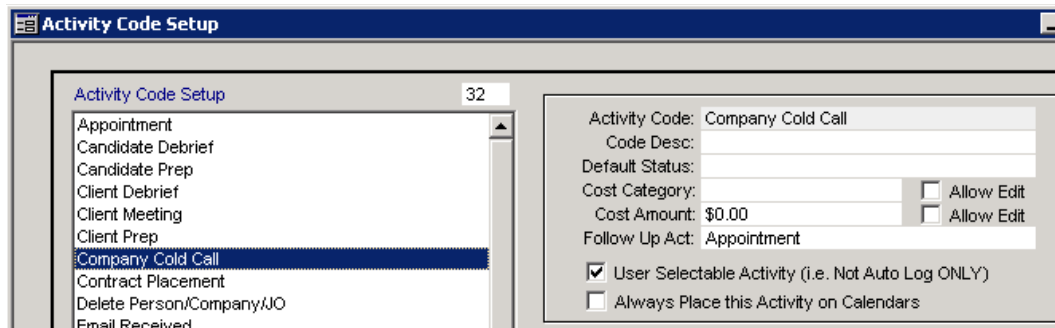
Documents Worth Creating For Your Own Company

A list of the activity codes that you use in the order from start to finish for the placement process. A sample is shown here:

Flow Through of Activity Codes
Company Cold Call
Client Meeting
New Job Order
Internal Submittal
Phone Call
Interview - Internal
Resume Submitted
Candidate Prep
Interview - Client
Candidate Debrief
Client Debrief
Client Prep
Offer

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A description of the activity codes you use and what they are used for. Notice how in the example below, some of the information isn't related to recording the activity on the computer but rather pointers for the new recruiter to be successful in the processes that make up your business. An example of what this might look like is shown below.

Activity Codes Used In Our Organization

- Appointment – Used for times that you will not be in the office.

- Candidate Debrief – Used after interviews for tracking feedback.

- Candidate Prep – Used before interviews. Make sure that they have reviewed the prospective employer's web site. For in-person interviews, make sure that they have directions or maps through their phone. Safety tip – ask them to find out the time it will take them from where they are leaving from to the client site. Saves them from being late! Also make sure they know the dress code. For phone interviews, ask where they will be doing it and how they will be certain to not have distractions. Tell candidate to bring several printed resumes even though manager(s) should have it.

- Client Debrief – For after interviews. Find out impression of candidate. Find out how well they fit position. Make sure you understand any discrepancies between job order description and what they are really looking for!

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