



Customer story

Policygenius ensures equity and efficiency with structured hiring

Greenhouse helps hiring teams automate and streamline routine tasks

greenhouse + **Policygenius**

The challenge

Designing a hiring
process that's both
equitable and efficient

Greenhouse solution

Greenhouse is the
single source of truth
for structured hiring



Fast facts

2014

year founded

\$170B+

in coverage sold

30M+

people have shopped
for financial protection



Company overview

Policygenius is the one-stop insurance shop that helps people get covered with confidence. Since its founding in 2014, Policygenius has sold over \$170 billion in coverage and helped more than 30 million people shop for financial protection.

While the company has offices in New York and Durham, their remote presence has been growing in recent years, now with around 20% of their 450 employees now working remotely full time.

Lisa Mitalas, Director of Talent at Policygenius, loves being in a role that influences so much of the company. “Ultimately, the work we do as recruiters or recruiting leaders impacts every person we bring to the company and the existing team,” she explained. “That feels really meaningful to me.”

The challenge

Designing a hiring process that’s both equitable and efficient

Like many people-first companies, Policygenius is committed to creating a consistent and equitable hiring process that reduces bias and assesses candidates on the skills and attributes they’ll need to succeed in a role.

In a competitive talent market, they also believe it’s critical to structure and streamline interviews to enhance efficiency. They don’t want to lose candidates because of a lengthy process or drawn-out period of decision-making.

“We used to do our offer process via Google Docs and email, but then we had no paper trail, no way of connecting every different group,” Lisa said. With so many manual processes, the challenge came from ensuring the team was on the same page – especially with data being housed in multiple locations.

All this manual work was also slowing down the feedback loop between hiring managers and recruiters. The team was in need of automated alerts and reporting capabilities that would help everyone involved in hiring know the status of a role without needing to search for it.

The solution

Greenhouse is the single source of truth for structured hiring

Since 2017, the Talent Acquisition team at Policygenius has used Greenhouse to guide every step of their structured hiring process, from intake forms and required skills to job descriptions and interview questions. “We trust Greenhouse as our single source of truth to house all our hiring information,” Lisa explained. During her time at Policygenius, she added, “We’ve become more and more reliant on the platform.”

The results

Equitable hiring practices limit unconscious bias

When thinking about how to promote diversity, equity and inclusion (DEI) in hiring, Lisa recognized that it’s important to design processes that are fair, equitable, scalable and repeatable. “I think the biggest thing Greenhouse has done is enable us to run a really structured and disciplined process entirely within the platform,” she said. Relying on Greenhouse for structured hiring means all candidates get the same great interview experience.

And with Greenhouse scorecards filled in consistently post interview and shared with regular debriefs, it’s easier to limit bias that could occur along the hiring process – Greenhouse only allows interviewers to see their teammates’ scores after they’ve submitted their own.





Customizability creates greater efficiency in the offer creation process

Lisa was also impressed with how easily Greenhouse adapts to different users' specific needs. The customization features create a more personal experience for candidates and ensure a streamlined workflow for employees.

"There are areas of Greenhouse where we can have a bit more flexibility in our processes to make things as effective as possible for our hiring managers. Being able to customize our offer creation process is one of those areas that we really love."

Gone are the days of manual hiring processes that involved a lot of time and steps. Now that everything lives in Greenhouse, the Policygenius TA team can set up custom fields and custom approvals and even make certain fields conditional. "Moving offers into Greenhouse has easily shaved 60% to 75% off the time it takes to create an offer compared to other ATS systems I've used," Lisa shared.

Actionable insights at a glance with Greenhouse Reporting

The TA team at Policygenius loves Greenhouse Reporting features, especially the pipeline snapshot report, since it automatically goes to hiring managers and helps them stay informed. "They don't have to go to their recruiter – it's going to automatically come to their inbox," said Lisa. The result? "There's no chasing each other. We know what to expect and we have this content immediately."

Lisa finds the visual nature of the reports also makes it easy to facilitate conversations with hiring managers. They can easily compare themselves to other orgs and departments and identify areas for improvement. "There's something about having a visual and being able to compare your pipeline to someone else's that really seems to resonate with hiring managers," she said.

And in cases where she gets an ad hoc or atypical request from company leadership, like a list of everyone who received an equity

grant in the past six months, it's easy to use the Greenhouse Report Builder to quickly generate that report. "I was able to really quickly go in and build a custom report with only the particular fields this person needed," Lisa explained. "That's been really wonderful because you get this high level of customizability and get just what you need."

From improving candidate interview equity to adding automation to reduce manual tasks and streamline communication between hiring managers and recruiters, Policygenius is now set up for hiring success with Greenhouse.

“Even if a company isn’t big enough to be doing something like structured hiring, Greenhouse will still be a great tool for you. And when you’re ready to grow your business, Greenhouse will ensure you climb the Hiring Maturity™ curve successfully.”

Lisa Mitalas
Director of Talent at Policygenius





Greenhouse is the hiring operating system for people-first companies. Our industry-leading software brings a structured hiring approach to any company's process, helping to promote fair and equitable hiring practices and data-driven decisions so companies can continuously get better at hiring.

To learn more, visit
greenhouse.com