Guide

# Mind your pipeline with Greenhouse

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# Mind your pipeline

## Design an efficient hiring process with Greenhouse to streamline your top of funnel and effectively nurture talent for your future needs

Greenhouse builds automation directly into your recruiting process to help you manage your inbound candidate pipeline. It also gives you access to tools that enable you to proactively nurture your talent pool so you're prepared for any hiring scenario – whether that's an increase in your talent pool when you're not actively hiring or a need to scale quickly and increase your volume of applicants to fill an unexpected number of new roles.

In this guide, you'll find actionable guidance and tips to help you maintain a healthy pipeline today and in the future so you're ready to tap into your talent pools for all your hiring needs.

## Here's the plan

### Manage a high volume of interested candidates

Automate application review
Use bulk actions for task management

### Nurture your pipeline effectively

Configure prospect posts
Build a prospect outreach strategy

### Optimize your workflow with ease

Maximize built-in reporting tools

# Manage a high volume of interested candidates

## Automate application review

Application review is the first step in the hiring process and is most effective when you've designed a process that quickly surfaces the candidates who most closely fit the needs of the role. The Greenhouse Recruiting application review module makes this process easy, and we want to further empower you to increase your efficiency and focus your time on the most qualified candidates in your pool. Here are a few tips to consider when building your automated application review process:

### Knockout questions

Your application review is only as good as the information you collect from your job post applications. Build a structured job post and use **custom questions** to ask for information that will make it easier for you to differentiate en masse.

### Create rules for application questions

Now that you've built in your knockout questions, create **application rules** to filter candidates based on their responses.

Use **auto-tags** to filter your candidates based on how they answered a certain question. For example, if you are hiring or building a pipeline for a role in a specific location, you can create a custom application question asking for their current or preferred location and set up an auto-tag rule to assign a location-specific candidate tag.

Use **auto-reject** to disqualify candidates early on based on their answers to your job application questions. If their ability to perform is dependent on expertise in a particular software or years of experience, create custom questions to collect data on how the applicant matches up. For those who don't meet the criteria, set up an auto-reject rule to remove them from your application review process for that role.

### Keep diversity, equity and inclusion (DE&I) top of mind

While increasing your efficiency by introducing automation, be sure to take intentional steps to keep unconscious bias from creeping into your process. Stay true to your commitment to diversity and consider implementing the following practices:

1. Audit your job posts to determine which requirements are essential and which are extraneous to reduce jargon, and focus on producing and disseminating content that appeals to a wide net.

2. Build application questions that may better encourage talent from diverse backgrounds. Instead of asking "Do you have a computer science degree?" ask "Do you have training in computer science?" to capture graduates from bootcamps like General Assembly, Code2040 and Girls Who Code who have the same capabilities as more traditional candidates.

3. Be sure that each question reflects a specific business need and aligns with what you've included in the scorecard.

4. Ensure that your referred candidates are held to the same process and standards as your inbound applicants. Research from **PayScale** suggests that women and people of color are less likely to benefit from referrals, which are a major strategy in many companies' hiring efforts.

#### Auto-advance in Greenhouse (coming soon)

You can auto-advance applications to accelerate your review process, similarly to how the auto-reject feature works. By leveraging custom logic, recruiters are able to automatically advance a specific group of applicants to the next stage of the hiring process without having to manually go through each application, helping you save time and valuable resources.

## Use bulk actions for pipeline management

Manage your pipeline-related tasks at scale with bulk actions:

### Bulk application review

For job posts that receive a high volume of applicants, **bulk review** a subset of applications from the candidate pool based on relevant filters or tags.

### Bulk schedule interviews

Email candidates in bulk to more efficiently set up interviews. Make scheduling recruiter screens even easier by using the **Calendly** integration to set up interviews with multiple candidates directly in Greenhouse.

### Bulk send assessments

Send assessments and take-home tests in bulk to further screen your candidate pool. Use the "all candidates tab" filter to advance or reject candidates based on assessment scores to keep things moving and save time.

### Asynchronous interviewing

Scale your interview process with video interviewing software and allow candidates to record interview question responses on their own time. Greenhouse offers 15+ video interviewing integrations to choose from - including **SparkHire** - to conduct one-way video interviews.

### Need help sifting through resumes?

Greenhouse integrates with over 80 **assessment and optimization solutions** to automate technical assessment and candidate matching processes.

# Nurture your pipeline effectively

## Configure prospect posts

**Prospect posts** allow you to collect applications from those who are interested in your company even when you're not actively hiring. Doing so allows you to build a pool of great talent to source from for future openings. Like job applications, you can configure custom questions and application rules for your prospect posts to help you identify the most promising prospects for your nurture strategy.

### Prospect post best practices

Highlight prospect posts by creating a "talent community" or "future opportunities" section on your website career page.

Map each prospect post to an existing prospect pool or stage.

Configure custom questions to collect prospect data.

Use application rules such as auto-tags to track prospect skills and attributes.

Leverage prospect posts within your company to facilitate internal mobility.

## Build a prospect outreach strategy

Take the time to nurture your prospects so you can confidently source from your prospect pool when you're ready to resume hiring. Create prospects pools and stages in **Greenhouse CRM** that segment prospective candidates by how you plan to communicate with and evaluate them for future roles.

**Example prospect pool**
Talent community

**Prospect stages**

**Not contacted**

Use this stage to review and categorize candidates, filtering them into the communication track that makes the most sense.

**In discussion**

Use this stage to manage prospects who are interested in a specific role and then encourage them to apply.

**Monthly/quarterly nurture**

Distribute a company newsletter and use the opportunity to share exciting company updates. Include information about new company award wins, PR mentions, published eBooks/ blogs and product launches to keep prospects engaged and interested.

**No longer interested**

For prospects who are no longer interested, use this stage to further segment them. Some reasons, such as timing, may warrant moving the prospects back to the nurture stages after a certain period of time.

New to using our CRM? Watch **this webinar** for an overview of Greenhouse CRM best practices.

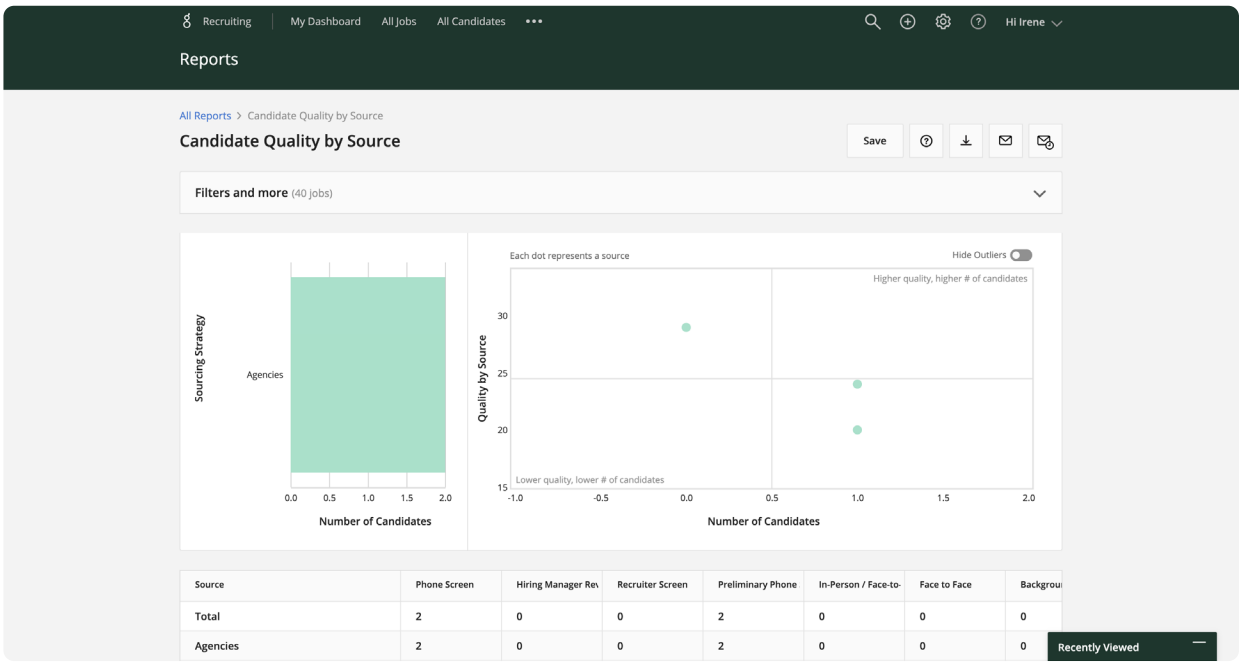
# Optimize your workflow with ease

## Maximize built-in reporting tools

Now that you've designed an efficient workflow to manage your inbound candidate activity, review your built-in reports to measure the effectiveness of your pipeline workflow. Here are a few reports to get you started. Save and schedule these reports for review on a weekly basis:

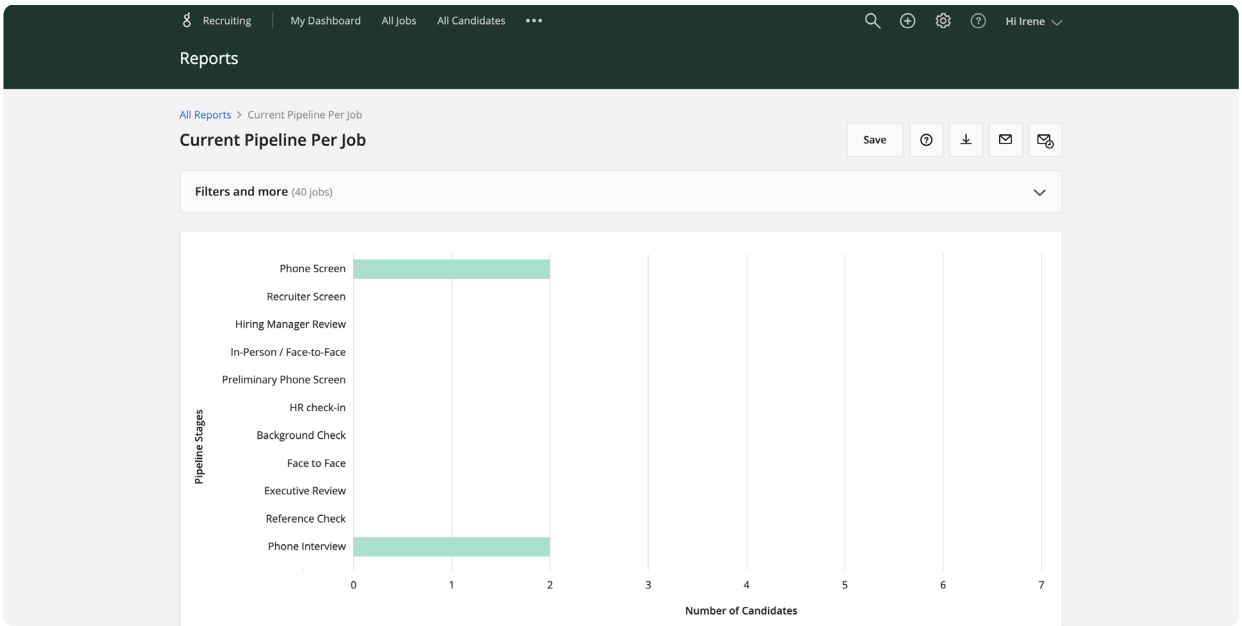
### Candidate quality by source

See how to use it



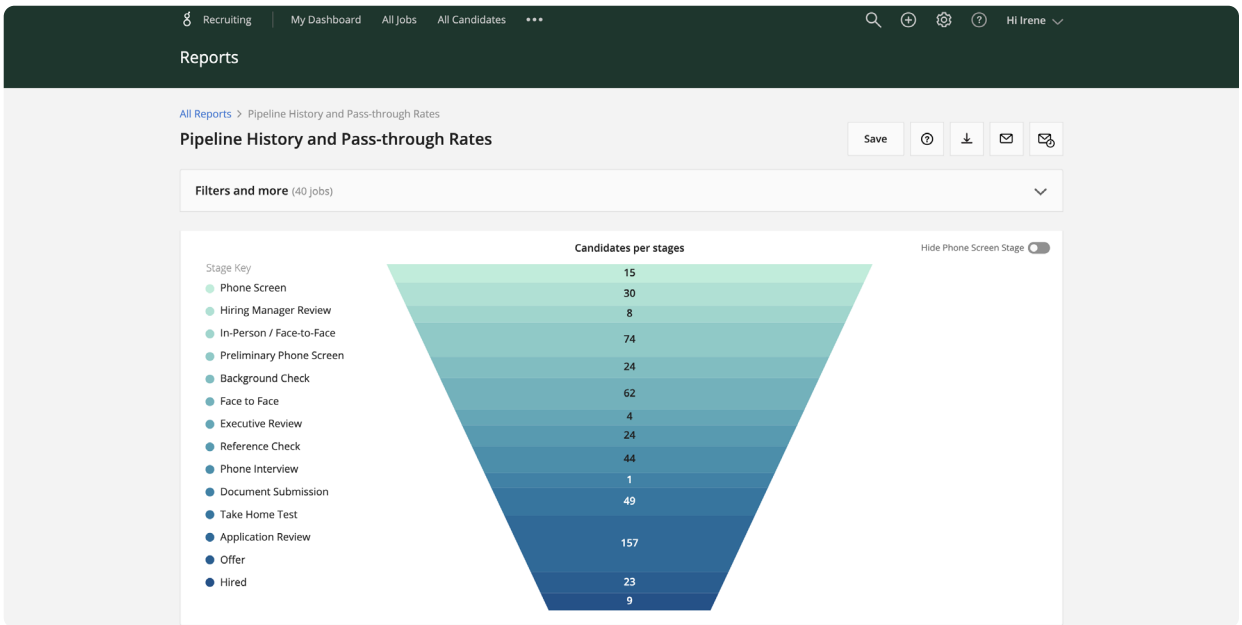
## Current pipeline per job

See how to use it




## Pipeline history and passthrough rates

See how to use it



# Conclusion

No matter your current hiring scenario, you can be more efficient by automating tasks and designing an organized process that helps you focus on what you do best – finding great talent. Whether you're experiencing a hiring increase or slowdown, this plan will help you maintain a first-class candidate and prospect experience and prepare you to hire for what's next.

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Greenhouse is *the* hiring software company.
We help businesses become great at hiring through our powerful hiring approach, complete suite of software and services, and large partner ecosystem – so businesses can hire for what's next.

To learn more, visit
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