Workable User Guide

WORKABLE Recruitment workflow

Now your account is set up, you’re ready to use the platform!

The current recruitment process will remain the same other than using workable for shortlisting , screening, scheduling and interviewing candidates instead of using LinkedIn, SEEK or BambooHR separately.
It is a centralised system for all applicants which will make tracking candidates so much easier!

As a reminder, here is the current recruitment process and where workable comes in:

1. Approvals/RR form: Follow the current approval process by submitting a recruitment request (RR) through BambooHR.
2. Job Brief: Once approved, The Talent team will schedule a job brief with you to discuss role requirements. (please ensure you have an updated PD at this meeting)
3. Workable & recruitment process: The TA BP will post the job Ad on WORKABLE. All recruitment processes from shortlisting , screening, scheduling and interviewing candidates will be performed on Workable by the hiring manager.
4. Offer: When ready to Offer, move candidate to offer stage on the workflow in Workable.
5. CIF Form: Head back to BambooHR and submit a contract information form for this candidate as per the current process.
6. Contract & Onboarding documentation: P&C team will take over from here with contract and onboarding.

What to expect with this guide?

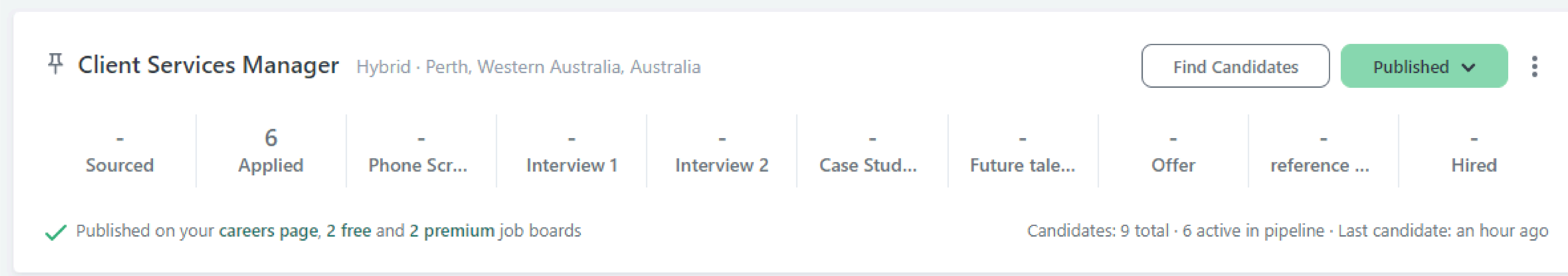
This presentation deck will give you an overview of you need to know to use the platform.

It will take you through:

- viewing the home page
- what details and tabs you can use to view candidate details
- moving candidates through the pipeline
- managing communication between candidates and your team.

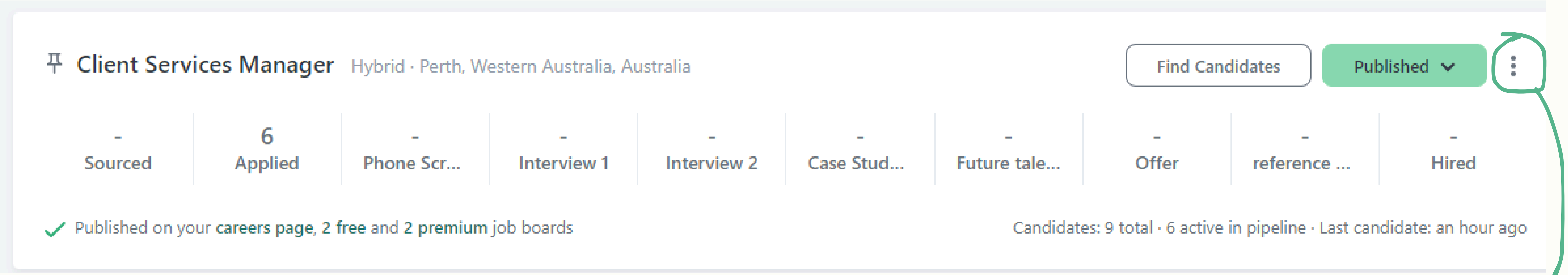
You as Hiring manager will own the pipeline with the support from the TA BP.
Other employees can be added to the job if necessary, otherwise it will be private to you and Talent Team.

Home page overview



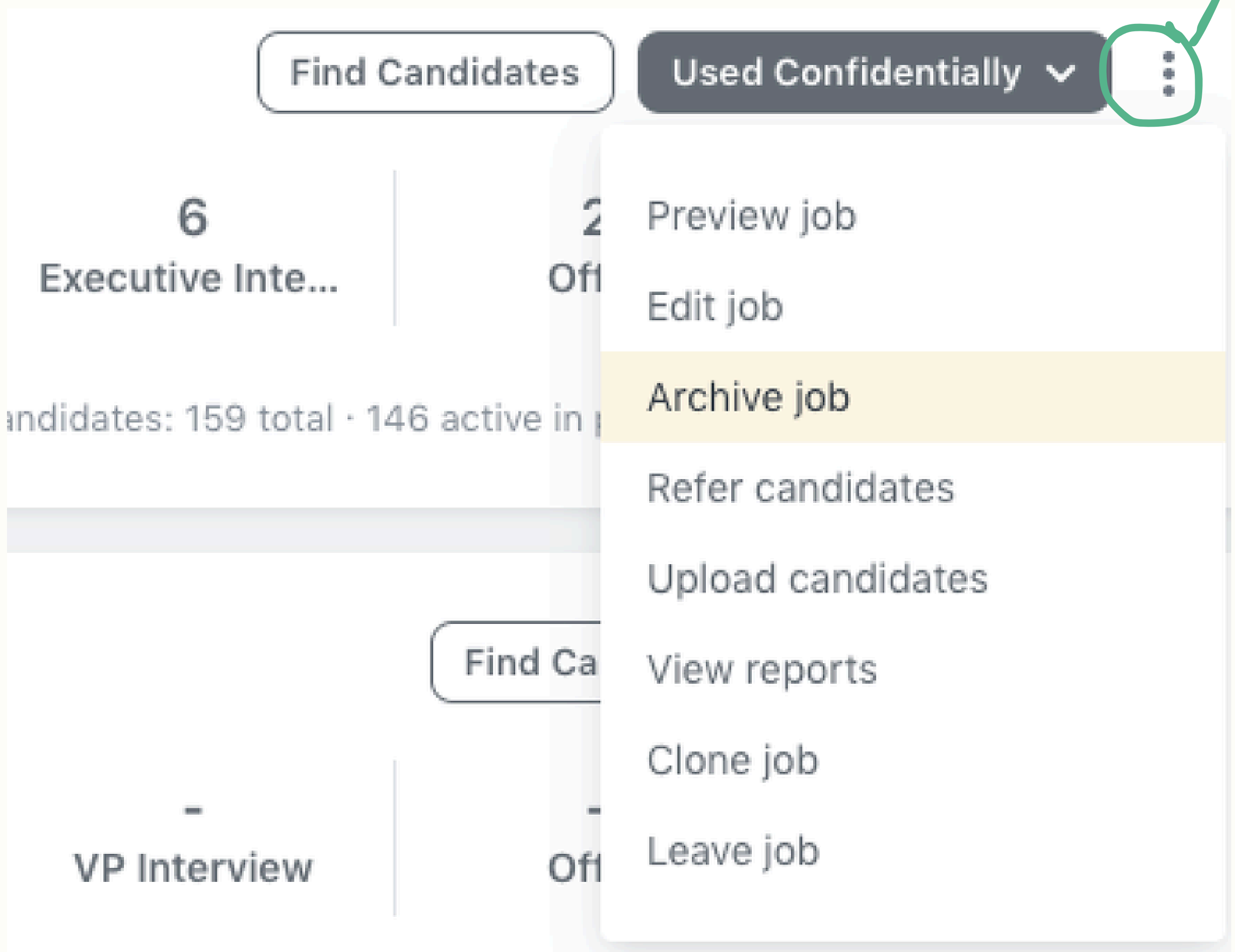
- This screenshot above shows what your home page will look like. You will only see jobs linked to you and your team.
- Here you can see the stages of the recruiting pipeline of each job you are part of and get a quick overview of how your hiring progress is going.
- See the number of candidates within each stage as they move from Sourced or Applied to Hired.
- Click on any stage in a job's pipeline to easily access the candidates' timelines within that job.

Access key job functions



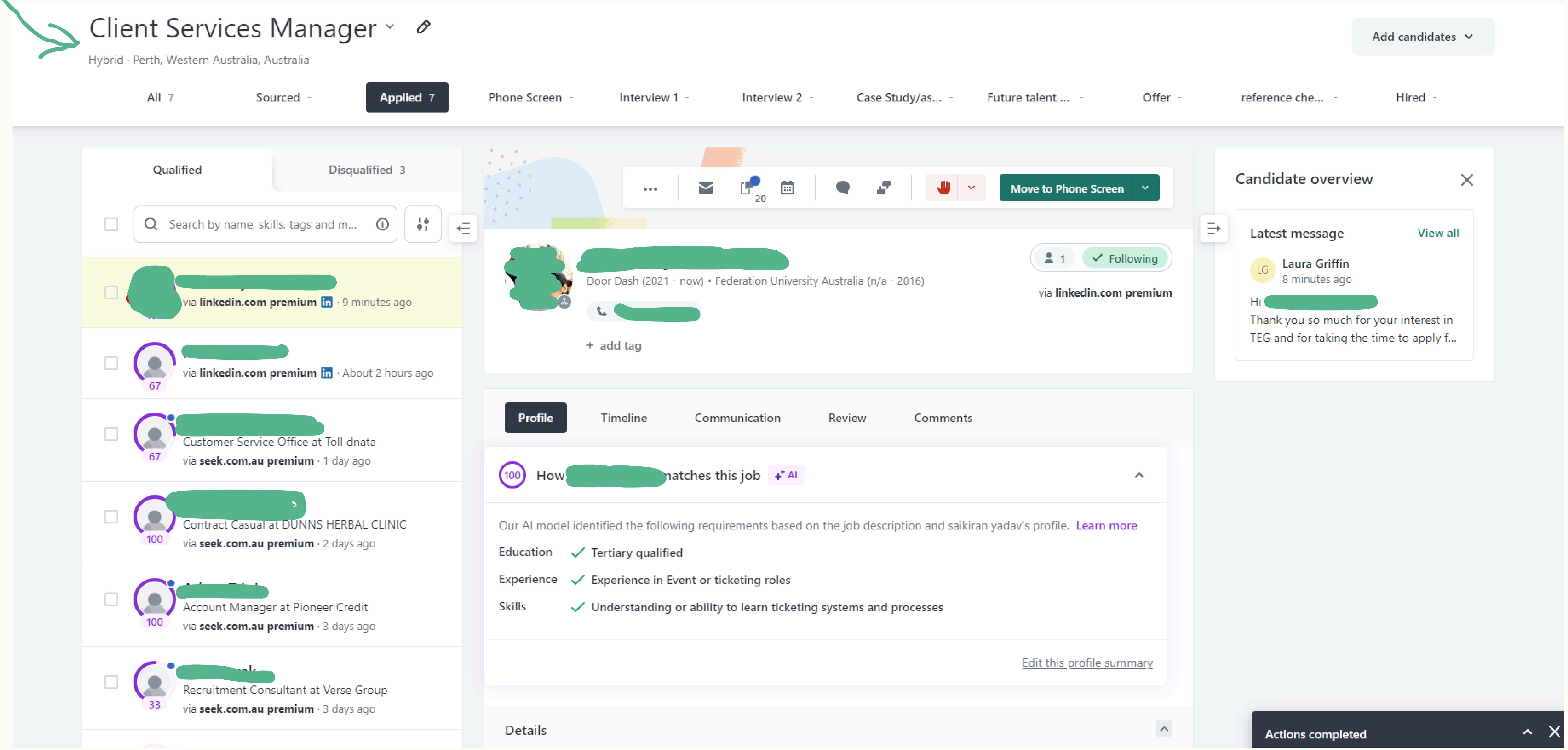
When reviewing the recruitment workflow for the new role it will look like the screenshot above:

- The new role will be assigned a workflow which is discussed in the job brief with the TA BP and totally customizable.
- The standard workflow process is, Apply -Phone Screen- Interview(s)- Offer - Ref checks - Hired.
- Next to each job's status button, you can find the job dropdown menu.
- Click on the three dots to select key actions for each job, from Previewing the job, editing it, to adding candidates and viewing reports
- All roles can be edited and updated automatically.



The Pipeline view

- When you click on the job title, you will view all applicants for the open role.
- You can see how many candidates are in each stage of the pipeline under the job title and click on each applicant individually.
- Keep the pipelines updated so that you know who and how many applicants still need to be reviewed or moved to the next stage of the process.

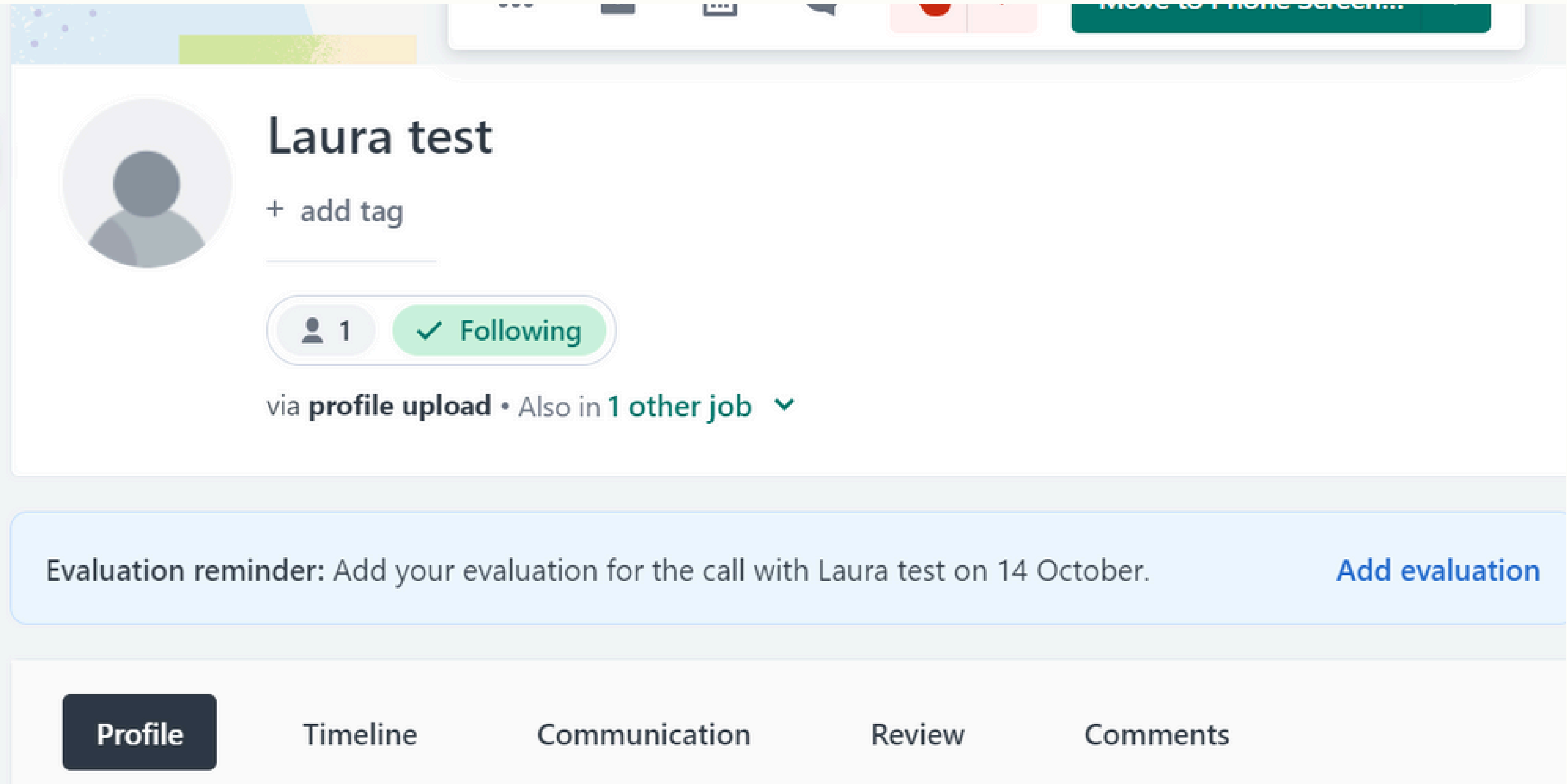


Access candidate profiles

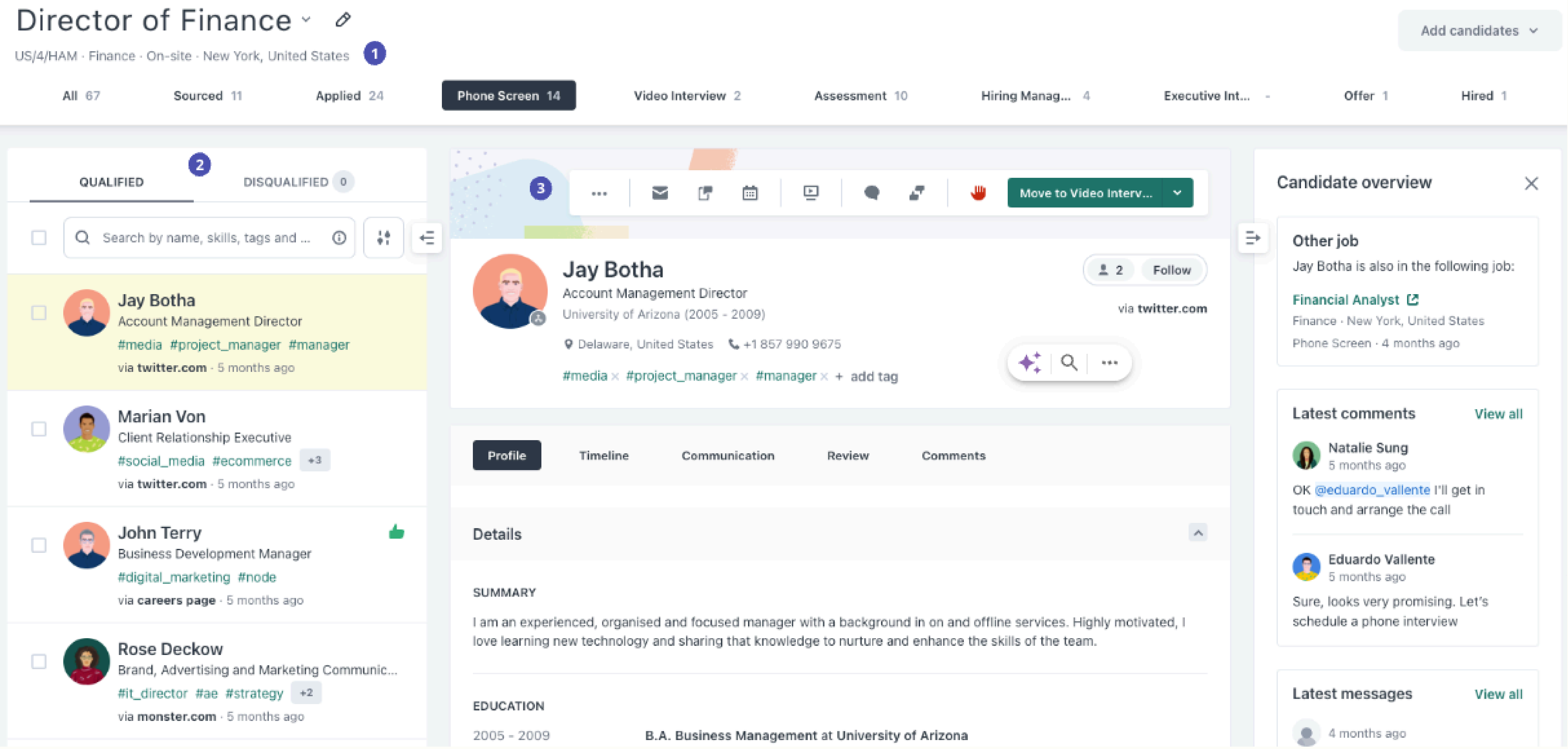
Every candidate in Workable has a candidate profile.

This is where you can review a candidate's resume and application details. It’s also a place for actions add/ view comments, send emails, invite candidates for interviews, or move them on to the next stage in the pipeline.

Profile will show you the candidates resume and answers to standard questions: salary, notice etc.
Communication will show all emails/ messages sent to the candidate.
Comments show all comments you have made on the candidate (candidate has no visibility of them)



Manage candidates through the pipeline

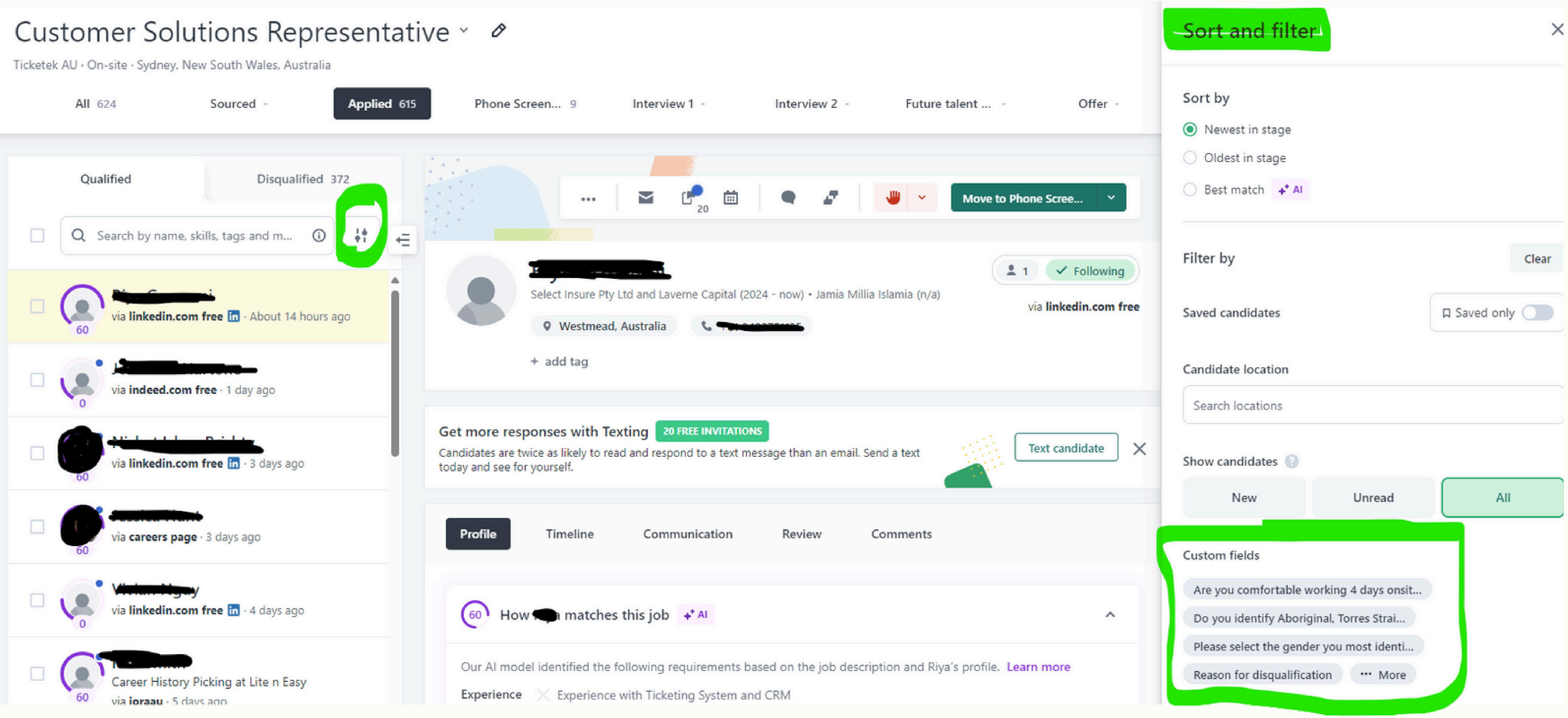


We would highly recommend Watching this short video for a step-by-step visual of how to manage candidates in the pipeline and how to use each feature!

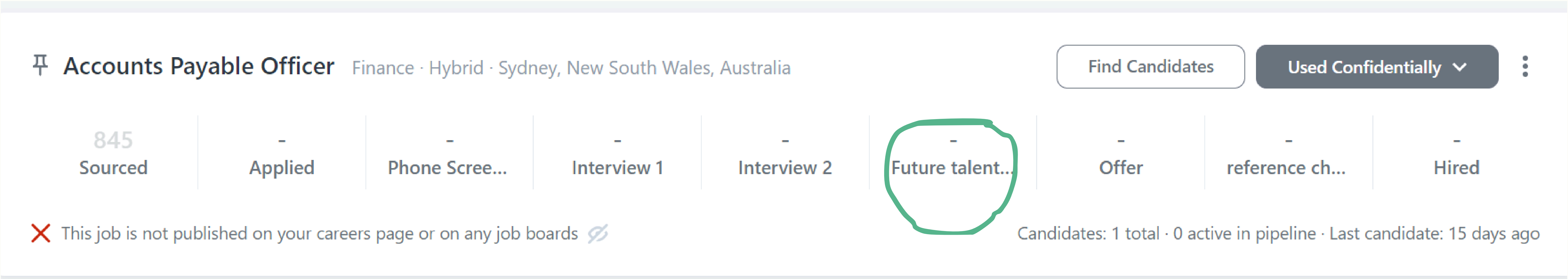
[Candidate profile in Pipeline View overview – Workable Help]

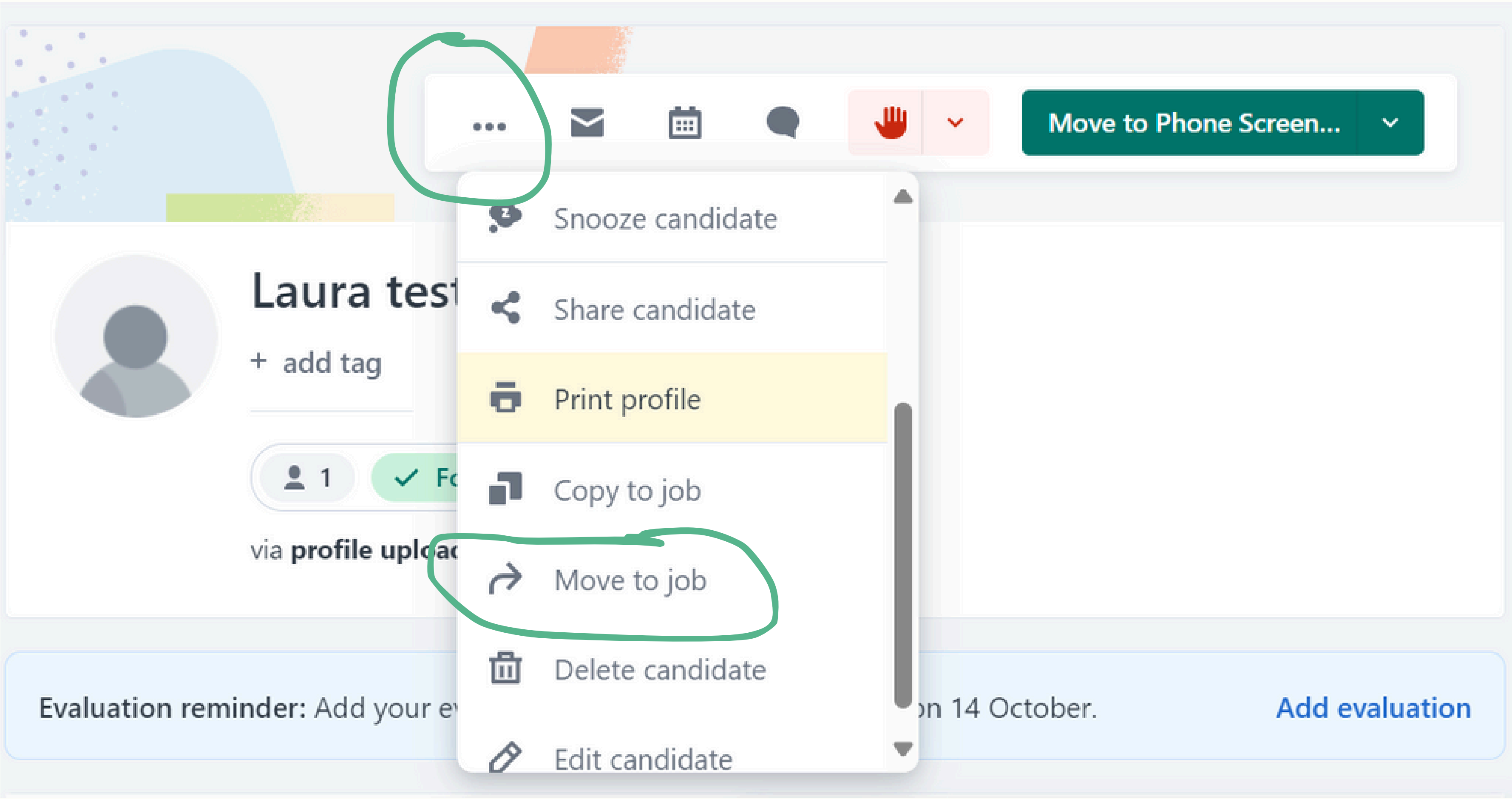
How to filter the applications by specific requirements to make shortlisting easier.

- in the applications list , click the filter tab and choose how you want to shortlist candidates based on the application questions eg salary/ notice/location etc.



Future talent tab OR Talent pooling



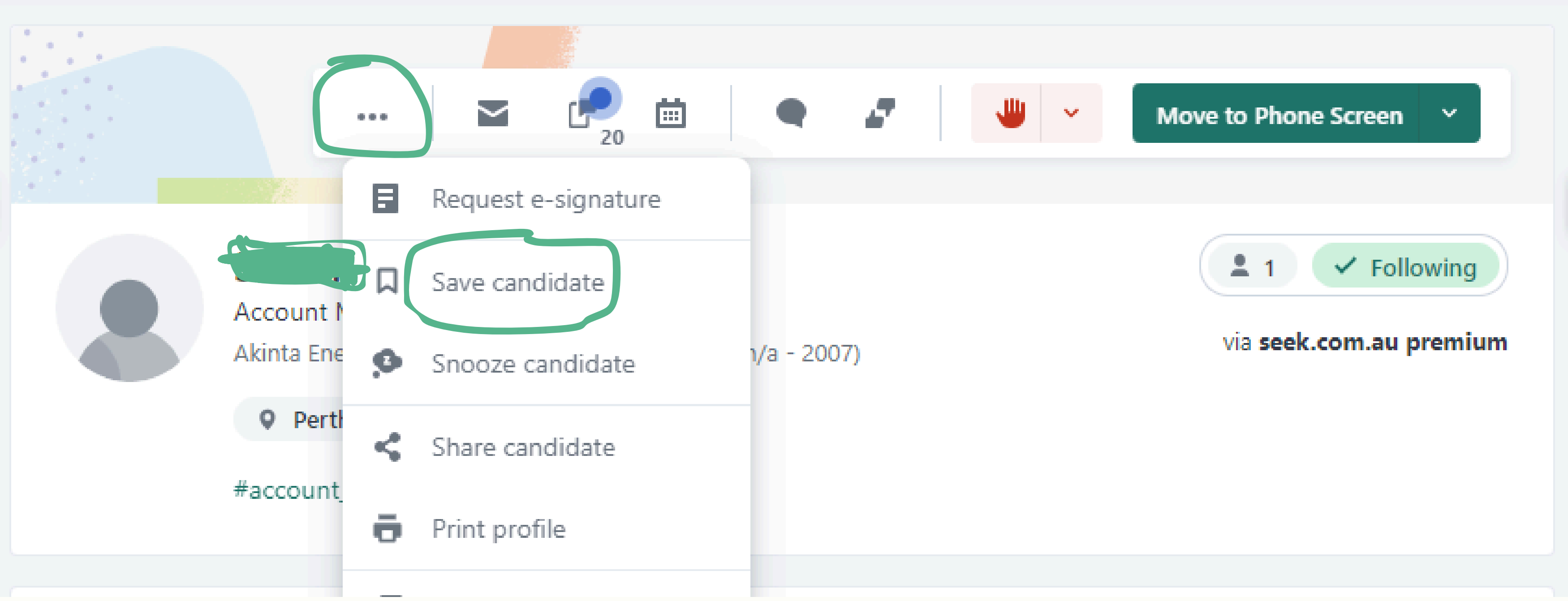


With every job workflow there will be a tab called '**future talent**'.
This tab is to keep candidates that would be more suitable for the same team or similar role on different level/sal range. It operates as a talent pool that's specific to the position.

If you feel another live role in the business is more suitable for a candidate you can move them to a different job in the platform by clicking the three dots in the candidates profile and clicking move to job.

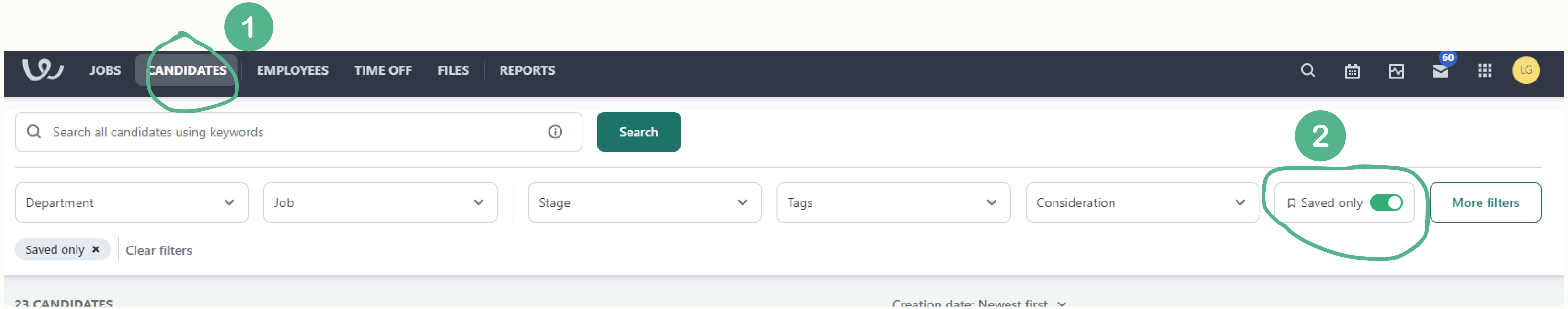
Saving Candidates

Unfortunately on the platform you cannot ‘move’ candidates into the ‘talent pool’, instead if you want to save a candidate for future roles not aligned to the specific live Ad, I would suggest to ‘**save’** the candidates. This way you can search the Job Ad/ skills and the candidiate will appear.

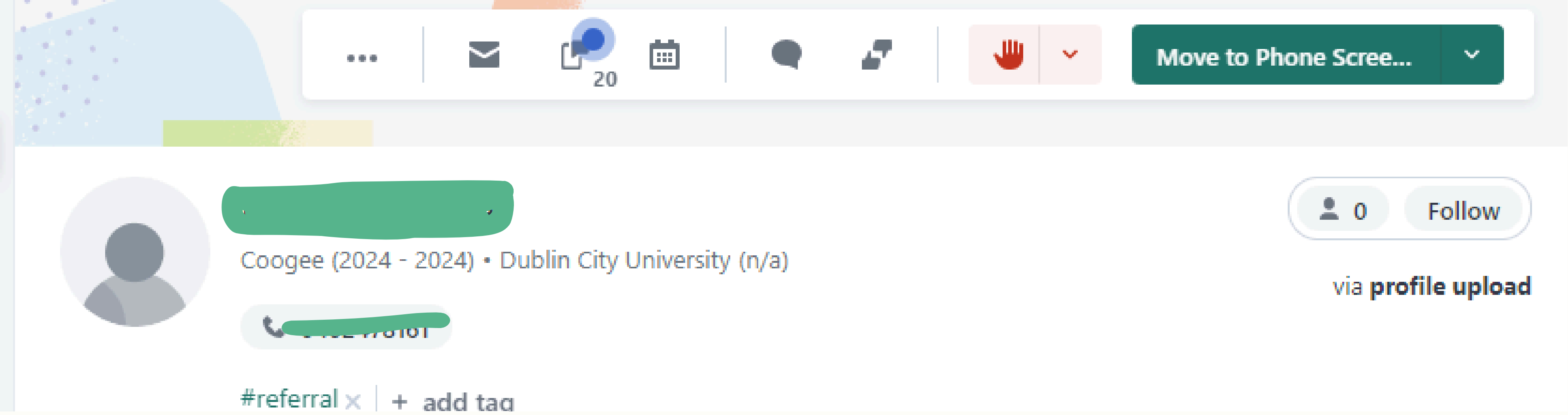


How to do this:

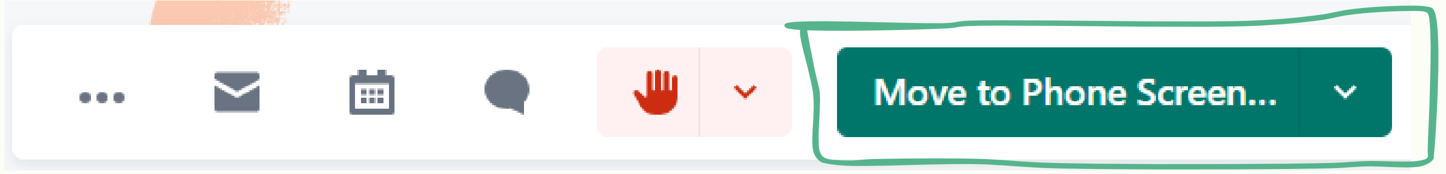
1. Click Candidates
2. move to the saved only tab and click ‘on’.
3. use the filters to see saved candidates under specific stages/location/skills/tags



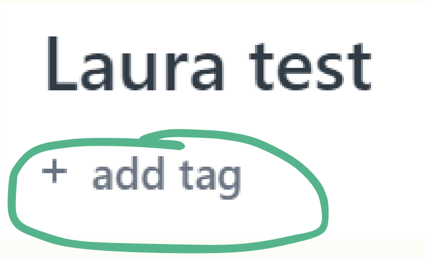
Quick guide for functions on the candidate profiles:



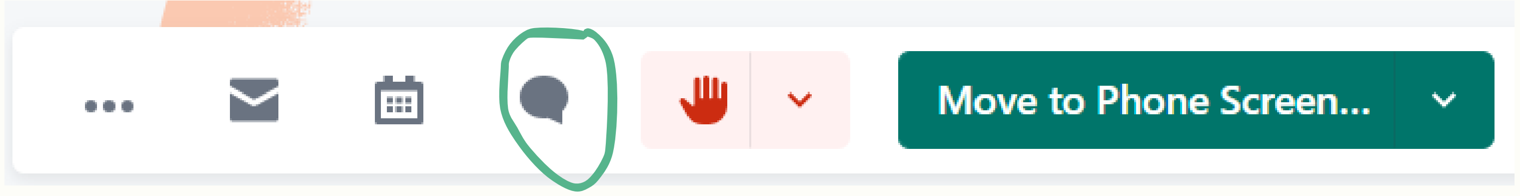
Moving candidates through stages of the pipeline. Click the <u>green button</u> to chose where to move them too. You can skip stages if needed.



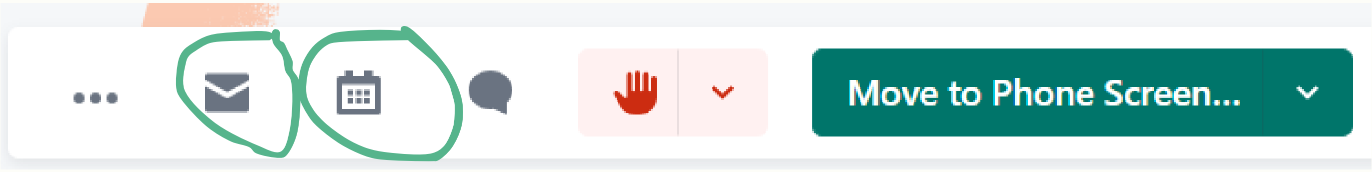
Adding tags: If tagging, be consistent with tags so that you can search candidates based on a particular category/skillset eg. ‘overqualified’/



Comments- you can tag someone in the hiring team or recruiter to action or view something in comments

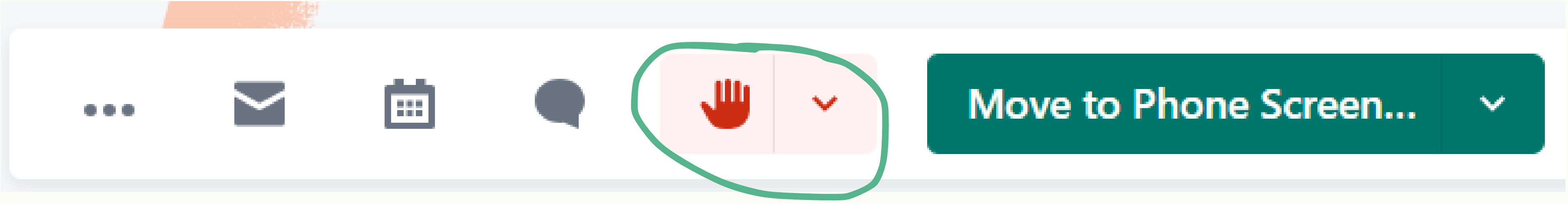


you can **schedule candidate interviews** using the calender icon or send an email to schedule.



Quick guide for functions on the candidate profiles:

Disqualifying icon - if you click this icon at the **<u>‘ apply’</u>** stage an automated ‘disqualification email’ will be sent to the candidate after 1 day.



Individual rejection messages can be sent at any stage, especially after phone screen/ interviews.


LG **Laura Griffin** sent an email (no reply) via **Automated Actions**
• Visible to Hiring Managers, Standard Members
17 days ago

Hi Val,

Thank you for your interest in TEG!

We received an overwhelming response to this Client Services Manager-Ticketing and Event Build position, which makes us feel both humble and proud that so many talented individuals (like you!) want to join our team. This volume of response makes for an extremely competitive selection process. Although your background is impressive, we regret to inform you that we have decided to pursue other candidates for the position at this time.

This may not be the end of the road for us though, we'd love you to keep an eye out for other positions you might be interested in so why not keep in touch. Just as we at TEG value our customers, we value our job candidates and invite you to review future job openings. We hope you see another position that sparks your interest!

Best wishes,

Laura Griffin

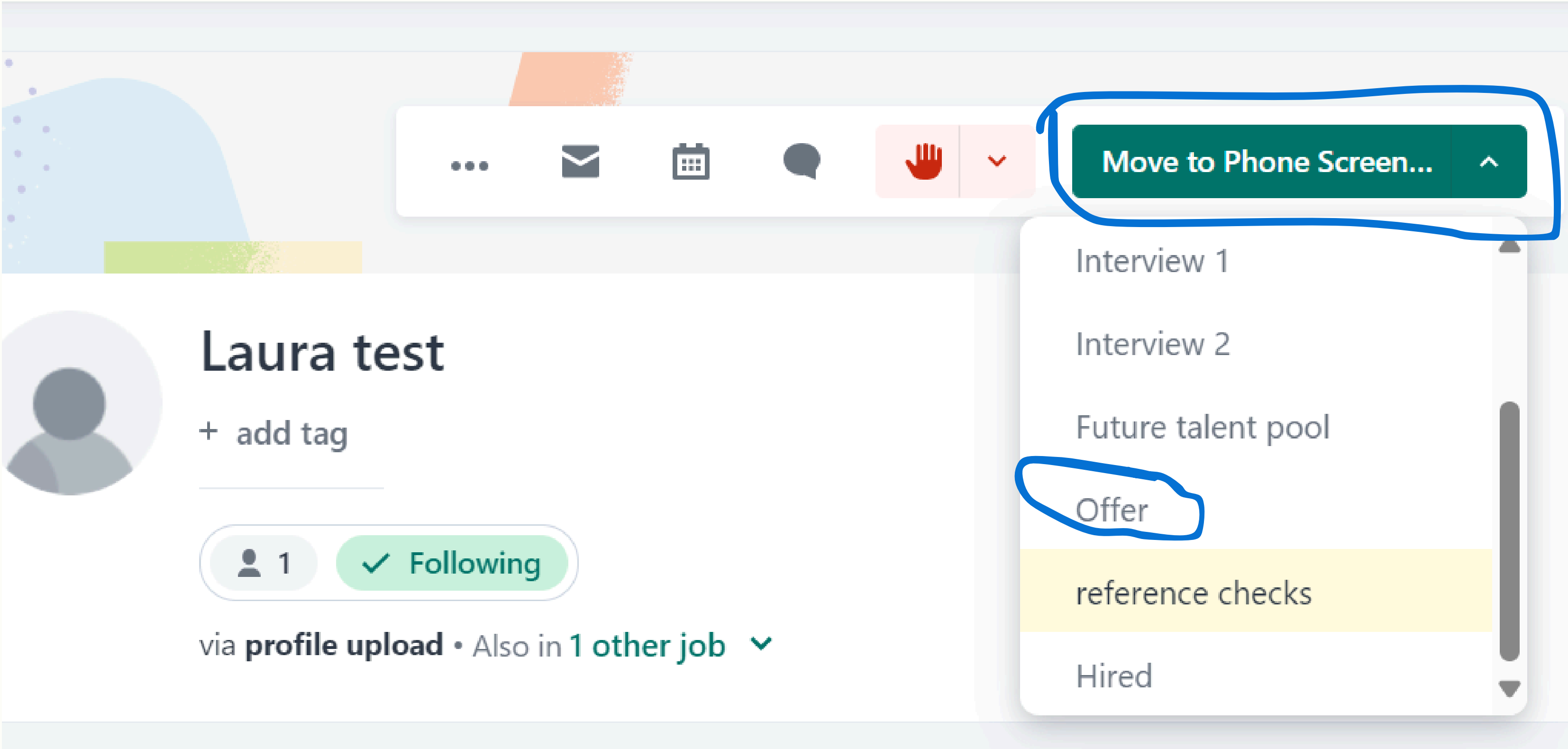
Templates are set up for convenience to send out comms to candidates or schedule interviews. They are all edible.

Step 4. Offer stage

When managing the candidates yourself from interview to offer stage, please call the candidate with verbal offer, If accepted complete a Contract Information Form on Bamboo and notify the TA team.

You can notify the TA team by @ them in the comment section. This will indicate the TA team to reach out for ref checks.

The P&C team will look after the contract, reference checks and onboarding documentation from here



Final stages- Reference Checks to hired.

- If a verbal offer is accepted, The TA team will move the candidate to the last two stages- reference checks and hired depending on where they are at in the process.
- No action is required at these stages. It is more of a visual for you and Talent team of what stage the candidate is sitting.

Further actions

- Should require additional support please reach out to Laura- TA BP.
- You also have a helpful resource on workable for all guides by clicking your initials on the top right corner- help- guides & resources.