Get Your Bullhorn CRM Automation-Ready!

Your automation checklist from Thrive

Are your consultants getting stuck on repetitive, time consuming and manual tasks? What if they could spend more time building relationships, working the job and making more placements?

Automating your Bullhorn CRM drives efficiency and productivity in your consultant team, resulting in greater profitability, growth and a better bottom line! In fact, every automation activity saves two minutes.

On a database of 5,000 contacts, that's up to 20,000 hours per month* – or 10 extra staff (and your database is likely a lot larger than that!)

That's why Thrive has produced this useful checklist to help you get your business and your Bullhorn CRM ready for automation!

Tick off each item as you complete it:

- ☐ Understand your current recruitment process and identify what would be useful to automate
- ☐ Understand what you want to achieve with automation, like:
  - ○ Reducing how much time consultants spend on manual processes
  - ○ Improving your brand reputation
  - ○ Making the most of your website analytics
  - ○ Creating a streamlined candidate journey through your recruitment process
  - ○ Having a clean and up-to-date database
  - ○ Identify which automation tool(s) would work best for your goals

Consider these capabilities:

Better data:

- ☐ **The Visual Workflow Builder:** Ditch the bespoke coding and create automated workflows quickly and easily that help your team track each candidate and client's progress
- ☐ **Website Tracking:** Get valuable insight into the behaviour of your website's users and create automated responses to important actions
- ☐ **ATS Field Updates:** Keep your database up to date with automatic ATS updates for your desired triggers, like survey responses, time lapses, online behaviour and more

Personalisation:

- ☐ **Cross-Entity Search:** Know who you're speaking to and create custom content for them with targeted audience segments
- ☐ **Smart Tokens/Merge Tags:** Keep open and click through rates high with personalised, dynamic communications content for your audience segmentations

Time saving:

- ☐ **Drag-and-Drop Email Builder:** Save time and energy and create email templates in just a few clicks that are mobile-friendly and easily optimised
- ☐ **Partner Integrations:** Get everything in your tech stack to talk to each other for better reporting and time saving
- ☐ **Text Messaging:** Streamline your communication with automated texts that deliver the right message at the right time

Input:

- ☐ **Feedback Collection:** Capture candidate or client feedback, NPS scores and more and quickly and easily boost your online reputation
- ☐ **Built-in Surveys:** Save your consultants time with surveys that capture availability, salary expectations, pre-screening questions and more with easy-to-build surveys

- ☐ Learn what good looks like and set KPIs
- ☐ Understand how to analyse your automated Bullhorn workflows
- ☐ Appoint a dedicated team or individual with the drive, skills and experience to manage your automation set up
- ☐ Or work with a knowledgeable recruitment marketing agency to streamline set up, roll out, KPI measurement, reporting and optimisation

Automate your CRM with Bullhorn Automation

Previously known as Herefish, Bullhorn Automation sits natively inside your Bullhorn CRM. This removes the need for complicated development work, and important client and candidate information can be fed directly to your consultants in real time.

If you're interested in creating personalised experiences at scale, improving your data health, and increasing your consultants' productivity by saving them precious time, get in touch with Thrive today!

Our recruitment automation team are dedicated to finding ways to improve our clients' processes and see those all-important results as part of our wider end-to-end strategic marketing and delivery services.

Let's talk automation today!

SET UP A CONSULTATION

**Based on a fundamental set up with an average of 10 automated actions each month per contact.*