

Placement tracking and onboarding

Automates the complete placement tracking and onboarding process from candidate acceptance through successful placement completion. Streamlines communication, documentation, and milestone tracking to ensure smooth transitions and reduce placement failures.

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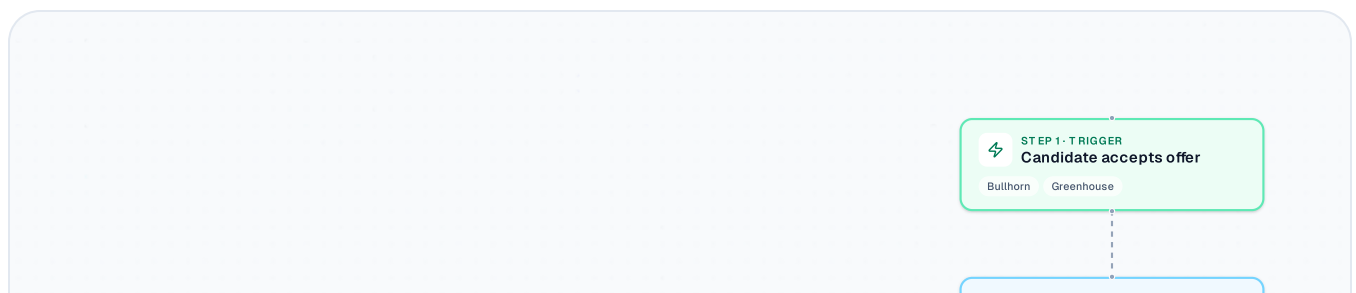


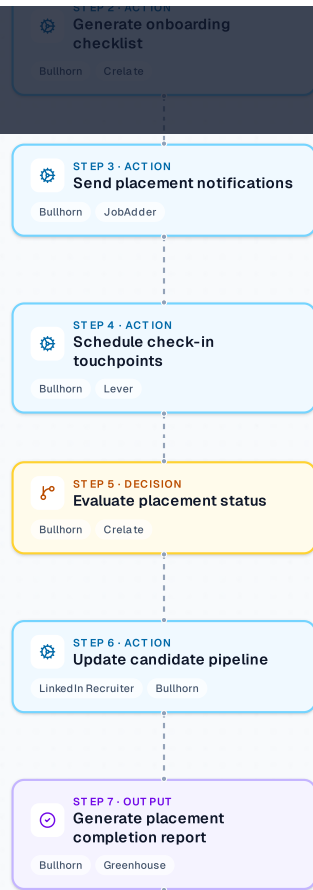
WORKFLOW TRIGGER

Candidate accepts job offer in the ATS system

Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.





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Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

⚡ TRIGGER

Candidate accepts offer

Workflow initiates when a candidate formally accepts a job offer through the ATS portal. This creates a placement record and begins the onboarding tracking process.

2

 ACTION

Generate onboarding checklist

Creates a customized onboarding checklist based on role requirements and client specifications. Assigns tasks to candidate, client contact, and recruiting team with due dates.

Bullhorn

Crelate

3

 ACTION

Send placement notifications

Automatically notifies all stakeholders including account managers, recruiters, and client contacts about the successful placement. Includes placement details and next steps.

Bullhorn

JobAdder

4

 ACTION

Schedule check-in touchpoints

Creates automated calendar invites for 1-week, 30-day, 60-day, and 90-day check-ins with both candidate and hiring manager. Sets reminder notifications for recruiting team.

Bullhorn

Lever

5

 DECISION

Evaluate placement status

Reviews completion of onboarding milestones and feedback from scheduled check-ins. Determines if placement is progressing successfully or requires intervention.

Bullhorn

Crelate

6

 ACTION

Update candidate pipeline

Adds successfully placed candidate to talent pipeline for future opportunities and referral programs. Updates LinkedIn Recruiter profile with placement history and skills validation.

LinkedIn Recruiter

Bullhorn

7

 OUTPUT

Generate placement completion report

Creates comprehensive placement report including timeline metrics, client satisfaction scores, and revenue attribution. Stores in ATS for performance analytics and client reporting.

Bullhorn

Greenhouse



Outputs

- Completed onboarding checklist with all milestones tracked

- Placement success report with timeline and satisfaction metrics

AI Business OS

Updated talent pipeline with validated candidate profiles



Key Metrics

- Time-to-full-productivity for placed candidates
- Placement retention rate at 90 days
- Client satisfaction score during onboarding process



Tools & Integrations

- Bullhorn
- Greenhouse
- Crelate
- JobAdder
- Lever
- LinkedIn Recruiter

AI Business OS

Actionable AI implementation strategies for business leaders ready to transform their operations.

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