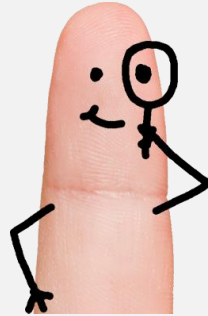


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employment prospects that includes unsolicited applications, suggested or recommended candidates who would be a great addition to the team if the right position opened up, and applicants who were not hired for one position, but would be well-suited for another.

Ongoing tracking of prospects in this way saves us time and money in the recruiting process. If HR and other managers have already done the work to qualify applicants, it makes good business sense to draw on that pool before spending money and time to advertise and screen a whole new group. If we hire one staff member a year from the pool of applicants and prospects we track, the process pays for itself.

Even if we don't have suitable candidates in our talent pool, the process gives us a thorough understanding of the effectiveness of our attraction strategies. We know who is applying and how frequently, and we can monitor the applicant-to-candidate conversion rate. The target rate is 10:3 – for every ten applicants we get, we should be able to screen in at least 3. If we aren't seeing this ratio, it's a signal to review our strategy for attracting applicants.

By rigorously tracking applicants and prospects, we will:

- ◆ Know if there are good potential candidates before advertising externally
- ◆ Know how effective our recruitment tactics are when we do advertise externally by tracking the number of:
  - Applicants per posting
  - Applicants who make it through initial screening
  - Applicants hired from variety recruiting sources
- ◆ Have evidence to support or adjust our methods of attracting top talent.

## Assumptions

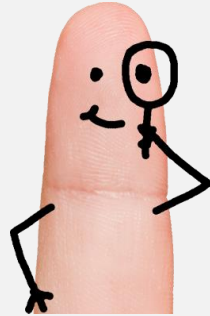
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Tracking Applicants is Stage 2 of the Recruiting & Hiring Process.



This guide assumes you've completed Stage 1. In other words:

- ◆ Approval to open a position has been granted.
- ◆ The position has been posted and advertised.



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Doc ID	Document Name	Description	Doc	Help	Ex.
TA-ALL-5530-R.	Sourcing Prospects Guide	Guide for all staff on how to approach and cultivate professional relationships with future employee prospects			
TA-HR-5510-X.	HR Master Applicant Spreadsheet	Spreadsheet for HR to track and sort all applications and expressions of interest from people who want to work in the company, maintain knowledge base of qualified candidates, and gage effectiveness of recruiting efforts			
TA-MGR-5520-M.	Position Applicant Tracking Spreadsheet	Spreadsheet template to help managers track, rate and shortlist candidates who have applied for an open position			
TA-ALL-5505-R.	Reviewing Applications Guide	Guidelines and recommended procedures for reviewing, shortlisting, or disqualifying job applicants in a consistent manner			

## Collect Applications

### Step 1. B.O.L.O. for Prospects!

#### MANAGER HR

Always be on the lookout (BOLO) for prospective new employees for our team.

Passive candidates, or prospects as we call them, are already working for other companies. So it's up to us to identify them and think of ways to get them interested in our company and keep them "warm" until an opportunity presents itself.

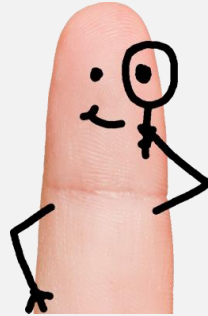
Of course, just because we identify and track them doesn't mean they will accept a position from us, but they might! We have to be careful that we're not seen as poaching other company's employees, so it's important that it's done in a professional manner.

When you meet someone who you think would be a great prospect for our company:

1. Make a connection with them.
2. Tell them a little about the company and that we're always on the lookout for talented people.
3. Tell them what they've done to impress you or why you think they'd be a great fit.

**NOTE:** There's a fine line between coming across as a business associate discussing a future job opportunity versus looking like you're harassing or looking for a personal connection.

Keep it professional at all times!



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- **Solicited:**  
Position Number\_Last Name\_First Name\_ YYYY\_MM  
e.g., 0005\_Parker\_John\_2016\_12
- **Unsolicited**  
Department\_U\_Last Name\_First Name\_YYYY\_MM  
e.g., Finance\_U\_Parker\_John\_2016\_12  
(the “U” stands for “unsolicited”)
- **Prospect:**  
Department (or Department Code)\_P\_Last Name\_First Name\_YYYY\_MM  
e.g., Finance\_P\_Parker\_John\_2016\_12  
(the “P” stands for “prospect”)

Adding a date to every applicant’s file name lets us track the number of times an applicant applies, and we will always know which application is the most recent. If you notice one particular applicant sending you an application once a week, for example, you can contact them and let them know: “As per the automated email you received from us confirming receipt of your application, we have indeed received your application...”

Using a four-digit number for the position number ensures that solicited applications sort in correct numeric order. It also makes it easier to search for files by position number. For example, if you search for position number “5”, the search results will show you every file name with the number “5” in it, whereas if you search for position number “0005”, you’ll only get files with that exact string in the filename.

- d. Once applications are saved in the **Master Applicant Tracking and Applications** folder, move the emails from the root of the **Jobs Inbox** to the **Processed** sub-folder.

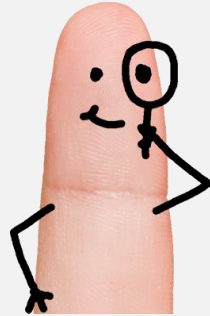
### Step 3. Review Unsolicited Applications

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#### HR

An unsolicited application is any application received that is not targeted at a specific, open position. When an **unsolicited** application is forwarded to HR, review the application and categorize the applicant based on how well their skills and background fit the Company needs.

The category you select will be entered in the *HR Master Applicant Spreadsheet* when a new entry is created for the unsolicited application.



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- a. Click to highlight the cell containing the last name of the applicant.
- b. Right-click and select **Hyperlink** from the pop-up menu. The **Insert Hyperlink** window displays.
- c. Use the **Look in** field to Browse to the **Master Applicant Tracking and Applications** folder. The list of files in that folder will display.
- d. Click and highlight the applicant's resume file, then click **OK** to add the hyperlink.

## Step 5. Create Position Applicant Tracking Spreadsheet

### ➤ HR

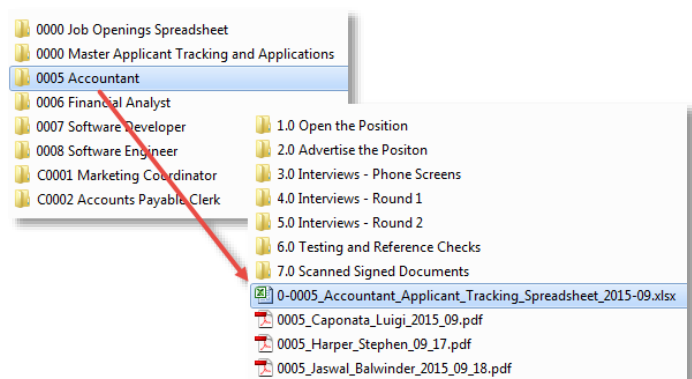
The *HR Master Applicant Spreadsheet* is an ongoing tool used by HR to manage and track all applicants and prospects for all positions.

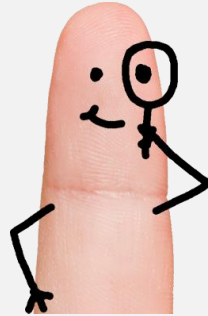
As soon as the position posting date closes, HR copies applicant information relevant to the posted position from the *HR Master Applicant Spreadsheet* into the *Position Applicant Tracking Spreadsheet* template, creating a position-specific spreadsheet the Hiring Manager can use to track applicants and record decisions throughout the screening and interviewing process.

This position-specific spreadsheet includes applications received in response to the job posting, as well as suitable resumes from prospects, unsolicited applications, and future potential candidates who were not selected for other positions.

There are several tasks in this step, but the end result is worth it. The Hiring Manager will collect all the tracking and screening information in one place, and HR will be able to easily extract it to update the *HR Master Applicant Spreadsheet*.

1. Open the *Position Applicant Tracking Spreadsheet* template and click to display the **Applicant List** worksheet.
2. Save a copy in the Position folder using the convention:  
0-<Position Number> <Position Title>-Applicant Tracking Spreadsheet-<Year> <Month>  
e.g., 0-005 Accountant-Applicant Tracking Spreadsheet-2016-10
3. Open the *HR Master Applicant Spreadsheet* and click to display the **Applicant List** worksheet. You now have two worksheets open.
4. Copy all solicited applications and suitable unsolicited applications for the position from the *HR Master*





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- d. Remove any applications that you know are not applicable to the Hiring Managers position.
- e. Save the populated *Position Applicant Tracking Spreadsheet*.

## Step 6. Copy Application Files to the Position Folder

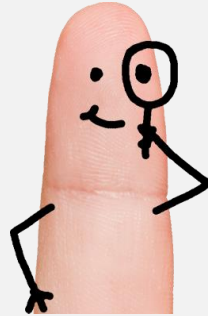
1. Open the **Master Applicant Tracking and Applications** folder.
2. Copy the application file for each applicant listed in the *Position Applicant Tracking Spreadsheet* from the **Master Applicant Tracking and Applications** folder to the position folder (e.g., 0005 Accountant). As long as the *Position Applicant Tracking Spreadsheet* and applications are saved in the same folder, the hyperlinks will continue to work.
3. Advise the Hiring Manager that the Position Applicant Tracking Spreadsheet is ready for review.

## Screen Applicants

### MANAGER

You will use the *Position Applicant Tracking Spreadsheet* to track applicants through the screening and interview process until a hiring decision is made. This spreadsheet contains 5 worksheets: **Applicant List**, **Phone Screens**, **Round 1 Interviews**, **Round 2 Interviews**, **Regrets & Future Potential**.

Applicant Last Name	Applicant First Name	Current or Last Employer	Current or Last Title	Shortlist for Phone Screen? (Yes/Maybe/No/Future Potential)  Future potential = Not for this position, but possibly in future	Comments/Notes
<a href="#">Pitt</a>	Angela	PeopleSoft	Financial Analyst	Yes	
<a href="#">Samuels</a>	Melanie	SAP	Software Developer	No	
<a href="#">Somani</a>	Bijan	ABC Company	Software Developer	No	
<a href="#">Uber</a>	Tom	facebook	Executive Assistant	FP	Currently in school for CPA, ready for practicum Fall 2016
<a href="#">Under</a>	Tracey	Grant Thornton	Controller	FP	Overqualified for this position, but good candidate if more senior position opens up
<a href="#">Verger</a>	Sophia	ConnectsUs	Accountant	Yes	



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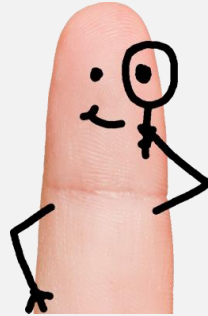
- **No** – Applicant is not suitable for this position or any other position in our Company.
  - **Maybe** – Applicant is being parked and set aside until all resumes have been reviewed and you know how many definite “yeses” there are. These applicants are first to be revisited if there are not enough quality candidates in the **Applicant List**.
  - **Future Potential** – Applicant not suited for this position, but should be considered for other positions in the Company.
3. Add brief notes to the **Comments/Notes** column (column K) so you can remember why you made the decision recorded in column J. Capture and record the work you did so the knowledge isn't lost.
- This prevents others from having to repeat work you've already done. Instead, they benefit from it.
  - It's especially important for any applicants flagged as “Future Potential”.

## Step 2. Select Phone Screen Candidates

---

### MANAGER

1. Click on the **Applicant List** worksheet of the *Position Applicant Tracking Spreadsheet*. Filter or sort the rows so that applicants are grouped by rating category (column J – Shortlist for Phone Screen?).
2. Consider the list of applicants categorized as “Yes” or “Maybe” for a phone screen. Your target is to conduct phone screens with 6-9 suitable candidates.
  - If you have **too many** applicants in the “Yes” category, review their applications again to see if you still feel they're equally suited for the position. You can do more than 9 phone screens if needed. It just takes more time and means you'll have to eliminate more candidates before you begin in-person interviews.
  - If you have **too few** applicants in the “Yes” category, re-visit the resumes of those you categorized as “Maybe” to see if you can move them to the “Yes” or “No” category. If you still have too few applicants, refer to the *Reviewing Applications Guide* for suggested options and next steps.
3. Copy the information of applicants categorized as “Yes” for a phone screen from the **Applicant List** worksheet to the **Phone Screens** worksheet:
  - a. In the **Applicant List** worksheet, highlight the applicant information from columns **F to I** (Last Name, First Name, Employer, and Title) and press **Ctrl + C** to highlight it for copying.



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