

YOUR PATIENCE IS APPRECIATED...



... **LUNCH WITH HALEY** will be served shortly.



# **Sense, Herefish, Automation...oh my!**

Lunch with Haley

September 2021









# Ins and Outs of Automation

101 and a little 201 lesson

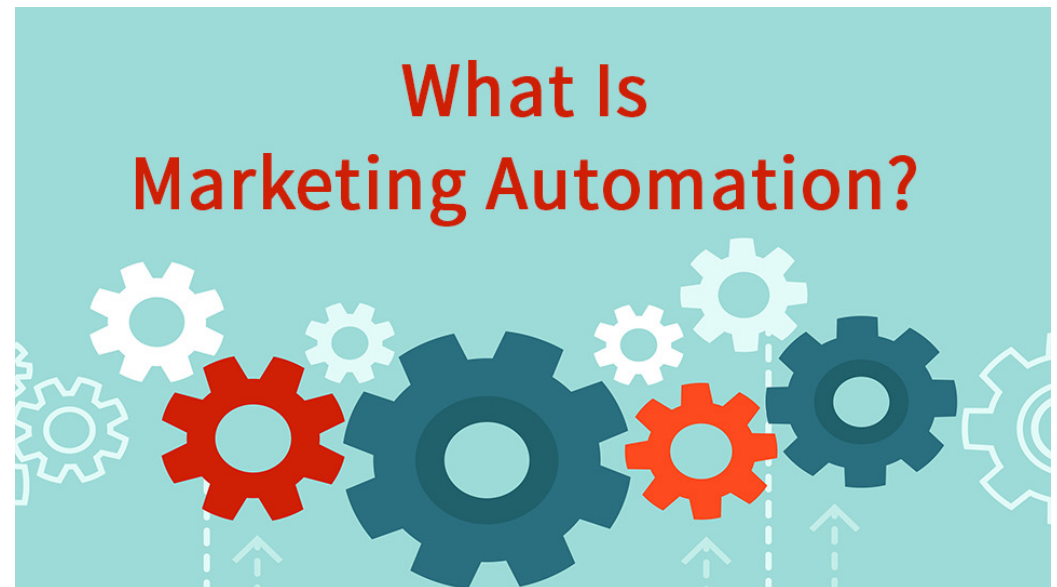


## What is marketing automation?

Marketing automation refers to software platforms and technologies designed for marketing departments and organizations to more effectively market on multiple channels online and automate repetitive tasks.

When we think of automation, it can be:

- Check-ins
- Process workflows
- Post-download emails
- Welcome series

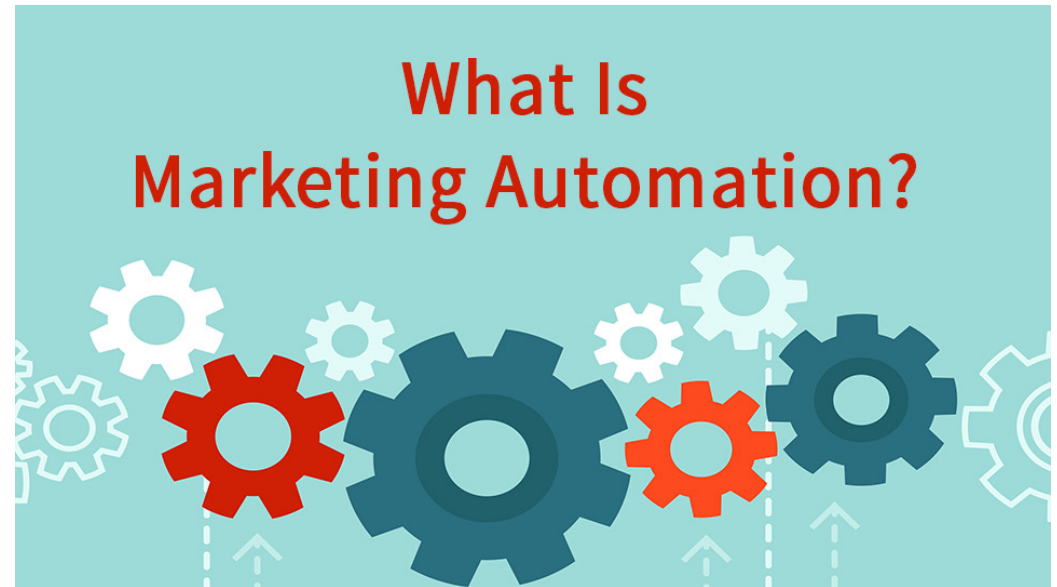


## What REALLY is marketing automation for staffing?

Automation comprises two main areas:

1. **Process** – eliminating tasks, data entry, busy works that sales and/or marketing people need to do in their ATS/CRM
2. **Engagement** – creating personalized, trigger-based messaging campaigns that take candidates/clients/contacts through the funnel

I call it “relevant conversation”



# What are the main platforms in staffing?

1. **Sense** – primarily focused on engagement side of automation
  1. Engage
  2. Chatbot
  3. Messaging
  4. Scheduler
  5. Discover
  6. Refer
2. **Herefish** – primarily focused on process automation and database cleanup; acquired by Bullhorn
3. **Hubspot** – gaining traction on Sales side for staffing firms
4. **ActiveCampaign** – we use for our marketing automation and can be used for Sales

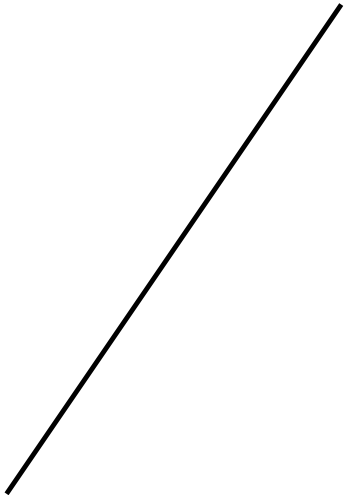


# Where to Add Automation

How to spot them







## Typical Pain Points

- “We’re spending too much time with admin work and not enough time recruiting or selling...”
- I didn't know that person's assignment ended
- Our people need to follow processes and stay engaged with our candidates
- “We need to stay in front of their candidates / MPCs more!”
- “Our database has so much bad data in it...”
- “We have so many people already in our database. I bet some of those people would apply.”



ADFAILURE.COM

**But first.**

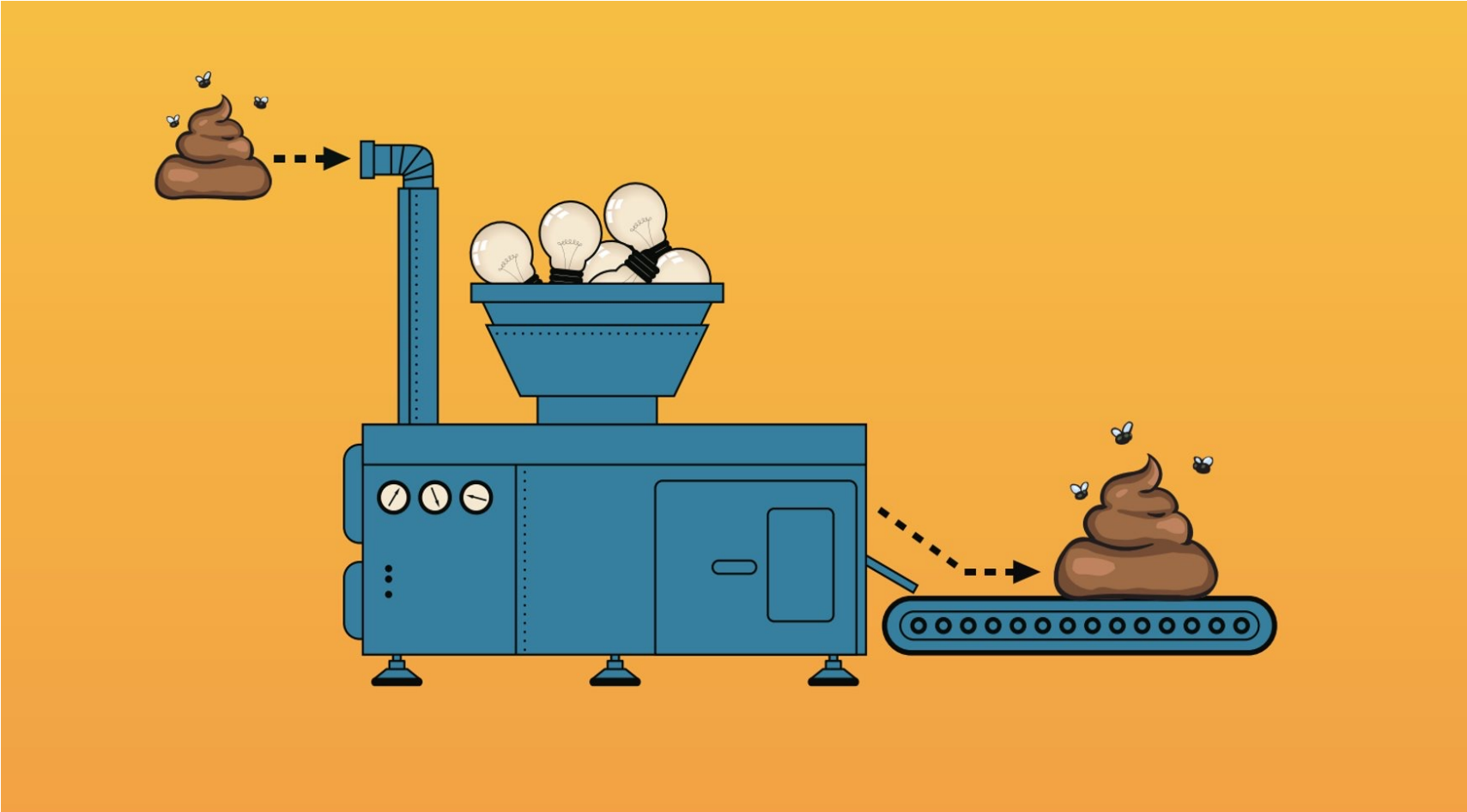
A few ground rules...



***"Sounds Cool is not a  
valid reason for automation."***

***"A newsletter is NOT  
an automation."***

***” Automation can NOT help processes when none are documented.”***



# Start Up and Scale Up Your Automation Game

Top 5 Lists



## Start Up Playbook

1. Start Date Reminder
2. Re-Engagement (Job Matching)
3. On Assignment
4. Re-Deployment
5. Post-Applicant



## Scale Up Playbook

1. Internal Notifications
2. Weekly Check Ins
3. Hot Jobs
4. Sales Drip Campaign
5. Strategic Review and Referrals



# Automation Prep

How to sell the benefits to your leadership team.

# Value Proposition

1. Saving admin time for recruiters (Big one...improved ROI!)
2. Better engagement with candidates and those currently on assignment (Better NPS)
3. Recruitment – we can find candidates in your database without having to always go to job boards (Lower job ad spend)
4. Keep your ATS up to date and working for you
5. Sales – expanding their salesforce



## Where to Start

1. Identify the Platform
2. Identify your POC
3. Get Leadership Buy In
4. Document/update your processes
5. Be agile
6. Be committed





# Questions?

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**Automate or Die: How to  
Start Up and Scale Up  
Your Automation Game**

Jeff Staats  
Chief Marketing Officer | Haley Marketing

**Automate or Die**

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# Upcoming Webinars

## PRODUCT DEMO

- HaleyMail & Blogging
- Tuesday, September 21 at 2:00 PM ET

Reserve your seat: [www.lunchwithhaley.com](http://www.lunchwithhaley.com)

