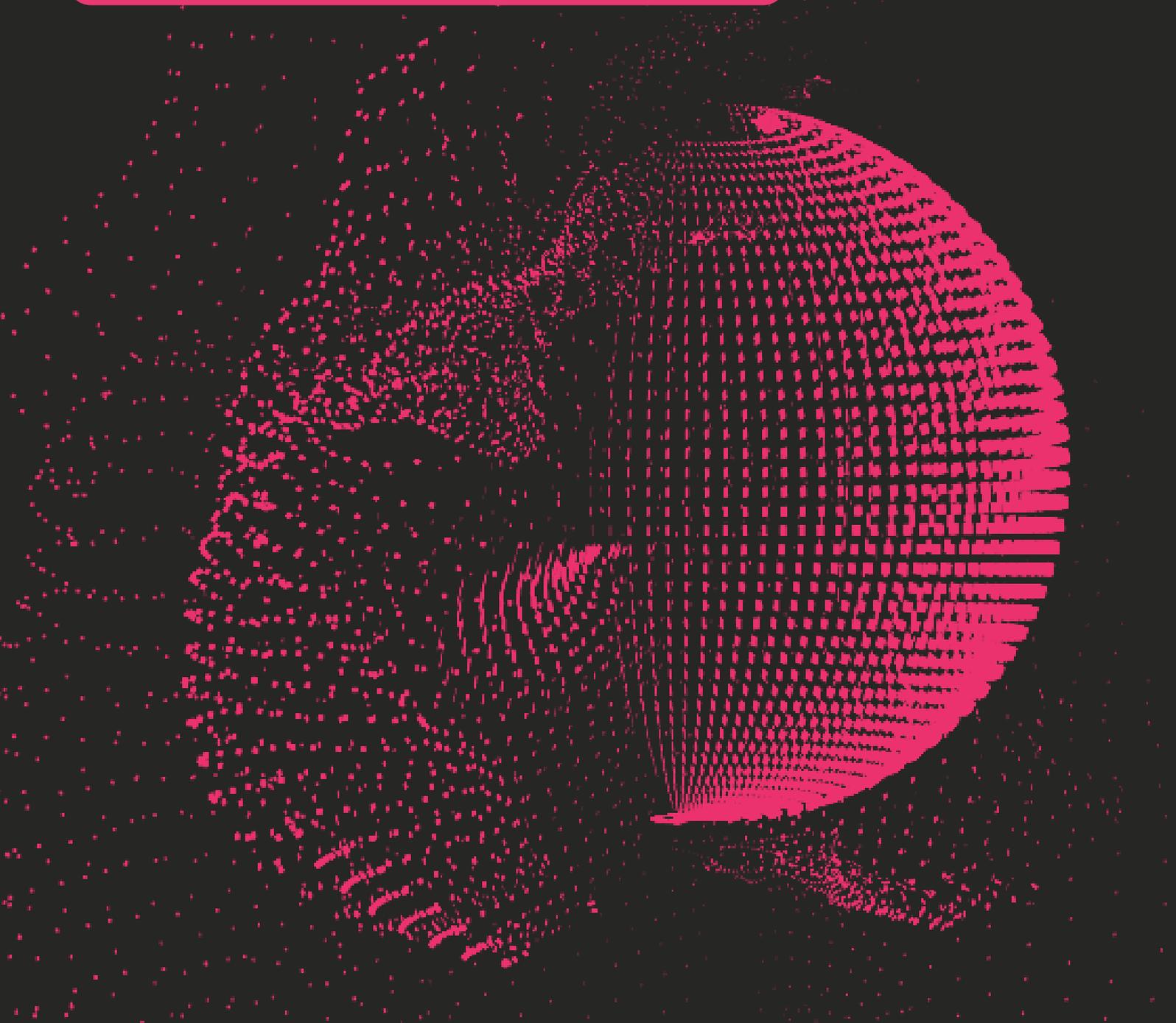


5 Critical Automation Types  
That Every Recruitment  
Agency Should Have



# Contents

Customer experience .....	4
Data hygiene .....	5
Compliance .....	6
Marketing / business development .....	7
Sourcing .....	8
About Roi-AI .....	12



Thank you for downloading this guide.

It has been written for those who work in the recruitment sector and are new to automation, to show how it can be utilised within a recruitment agency context.

We have split this guide into five sections with each talking to a specific use case, although there are many different automations that could fall under each heading. Included are several examples to show how an automation could be built to solve specific recruitment challenges.



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# Customer experience

## The Problem

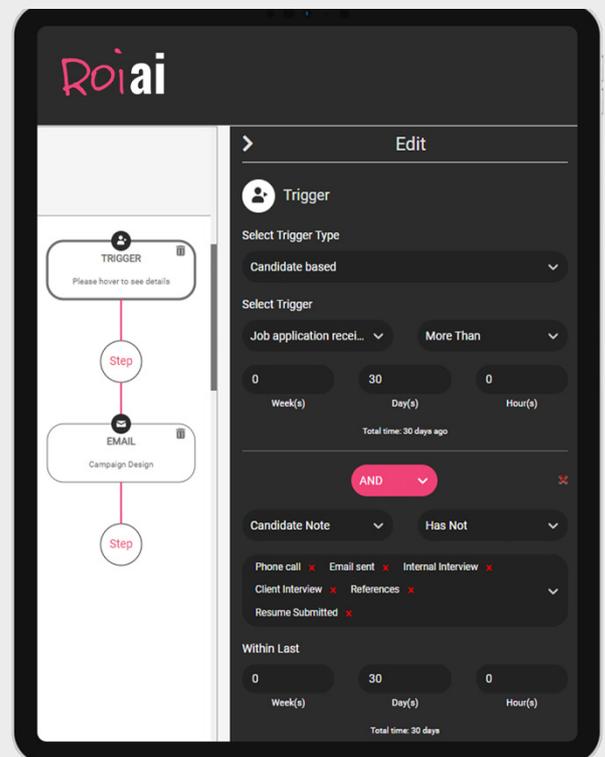
One of the biggest complaints the majority of recruitment agencies receive is not getting back to people or providing feedback. It could be as simple as not receiving a rejection from a job or starting a contract role and then not hearing from the recruiter until the contract is due to finish.

## The solution

Automations that trigger based on specific things happening throughout the candidate (or client) life-cycle. This is all the way from their first interaction with your recruitment agency, through to them securing a role and beyond. Implementing these automations is a sure-fire way to make your brand stand out from your competition.

## One simple example automation

It is hard to pick one, but simple is often best, so our choice is an automation that ensures all job applications that are not progressed receive a response back (generally a rejection). Although most databases will bulk reject when a job is closed, jobs can remain open for months, meaning candidates often hear nothing. This automation sends a rejection note after a pre-defined period of time, for example five days, to anyone who hasn't had a candidate note in that timeframe.





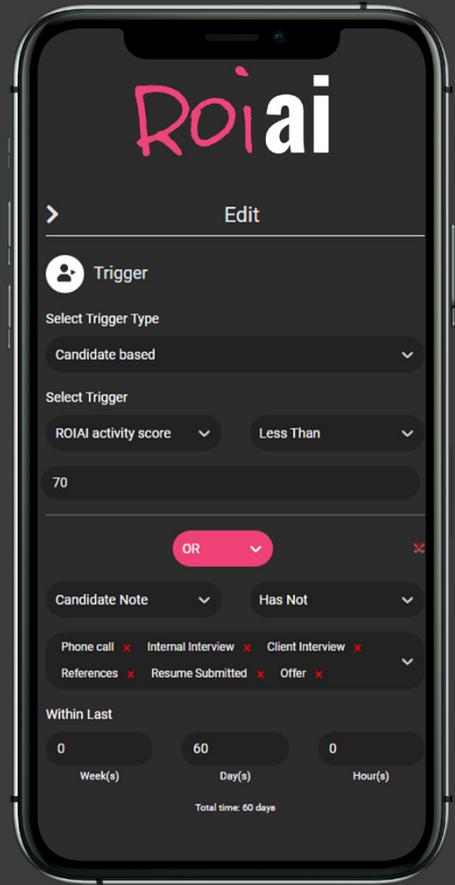
# Data hygiene

## The problem

Recruitment databases are static - once a candidate or client is added they are rarely updated, with the exception of manual input from the recruiters themselves. This means that the recruitment teams are always searching old data.

## The solution

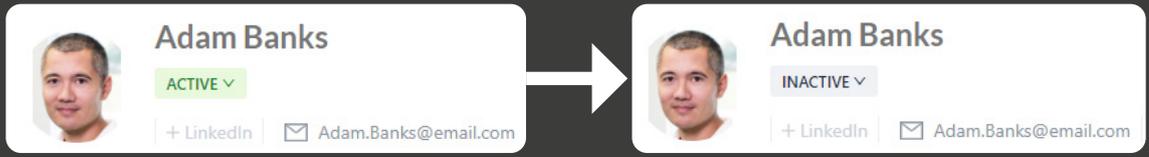
Automations designed to bring your recruitment database up to date so that recruiters can have better data from which to make decisions or run searches.



## One simple example automation

An ongoing automation that constantly updates the status field of candidate records based on recruiter activity on the database or the candidate's activity on your website or marketing platform.

For example, if a candidate has no activity for 60 days their status could be changed to Inactive. Conversely, if a candidate were to perform a specific type of activity (such as visiting the Jobs part of your website) their status could be changed to Active.



# Compliance



## The Problem

There are many certifications, tickets and ID requirements when managing contingent labour. Organising and updating these details inevitably turns into a full-time job.

## The Solution

Prebuilt automations that monitor key fields from within a temporary or contractor record and notify the recruiter or compliance contact when there is an upcoming risk. Plus, if required they can also be set to contact the candidate to gather the updated information.

## One simple example automation

A candidate is placed into a temporary assignment, but they are on a work visa. This automation would notify the compliance coordinator that the candidate's work visa is due to expire in the near future and also contact the candidate to request an updated copy of their new visa. If received, this would be immediately sent to the relevant contact.



# Marketing / business development

## The problem

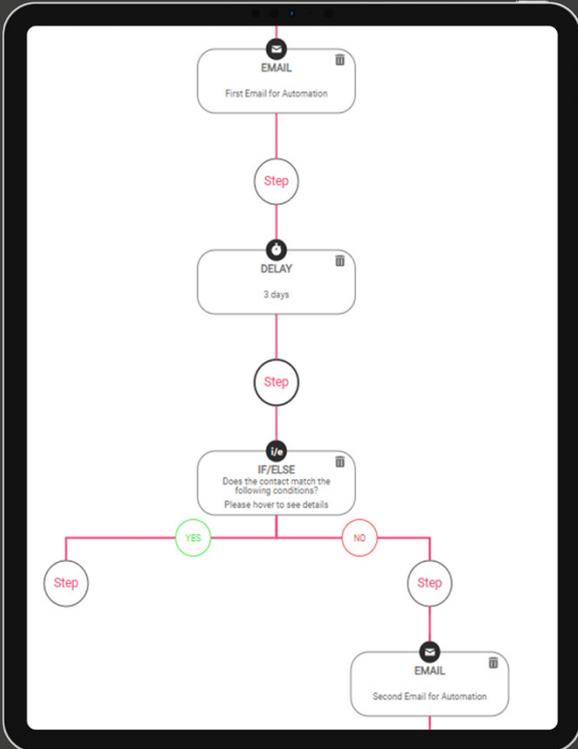
Marketing tends to be a one-size-fits-all process. Worse, significant amounts of time is spent producing content that can be shared with your audiences, only for it to be given one opportunity to be seen.

## The solution

Automations can be utilised to send the right content to the right people and also give your content a far greater chance of being seen.

## One simple example automation

A campaign automation set up to target a specific candidate (or client) audience from the database, asking them to complete a short salary survey. The automation would resend the email to anyone in the audience that didn't open the initial email (the subject line and email could be adjusted). Any survey completions would be stored in the system and the candidate or client's details would also be updated in the database with any new information that is obtained.



# Sourcing

## The problem

Not all the candidates you need are located on the recruitment database. Often, they are found on channels such as LinkedIn, but they do not always respond to the first outreach message and it is hard to remember to follow up.

## The solution

Sourcing automations can do the legwork for you and they can continuously reach out to prospects over time. One outreach campaign can also reach many prospects at once.

## One simple example automation

Ten prospective candidates are added to a sourcing automation. This automation then sends prebuilt email nurture campaign to them at predefined times and dates. If they respond, it gives them the immediate opportunity to book a slot in the recruiter's calendar. If they respond as "not interested," they will be archived.



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Hopefully this guide has provided you with an initial insight into how both marketing and business process automation could benefit your recruitment agency. There are, of course, many other automations that can be utilised both within these categories and for other purposes.

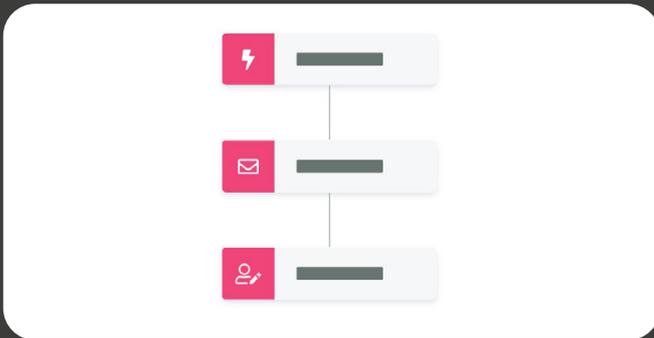
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# The Roi-AI platform

Roi-AI is a marketing and process automation software solution built specifically to help those in the recruitment industry.

Utilising machine learning, chatbots, referral gamification, activity tracking and email / text automation, we enable recruiters to focus on the human element of recruitment.

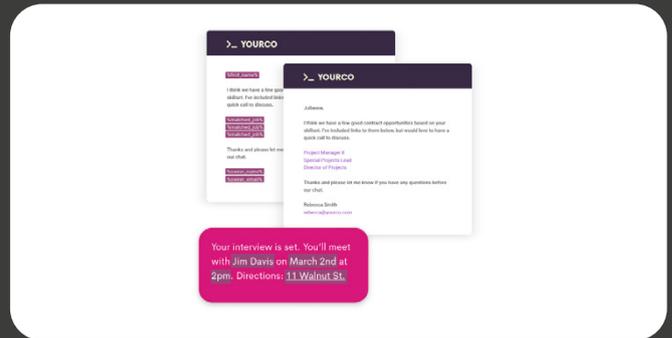


## Marketing Automation

Looking to make cold prospects warm, get more value out of your existing database, reduce spend on candidate sourcing, or activate old sales leads?

With advanced email, text and WhatsApp lead nurturing, database cleansing and re-engagement functionality, this is what Roi-AI was built to do.

[Learn more](#)



## Business Processes Automation

Reduce the cost of compliance, avoid expensive dropouts and get real-time data on how your recruiters are doing.

Explore how Roi-AI's automated registration, compliance and business performance insights tools can make your business more efficient.

[Learn more](#)



## User Activity Scoring

Know when a client opens a CV, a top candidate becomes active or even when someone you placed visits your job board. Plus, give a score to each unique activity to bring your database to life.

Give your sales team the edge.

[Learn more](#)



## Referral Gamification

Referrals have long been one of the best sources of placed candidates, however most referral initiatives fail miserably. Roi-AI has the solution.

Significantly increase the volume of quality referrals and give your agency a competitive advantage.

[Learn more](#)

[Click here to book a demo](#)



## About Roi-AI

The team at Roi-AI founded the company with one goal in mind: To create an automation product that offers recruitment agencies true transparency on their return on investment.

Privately funded through a group of recruitment industry entrepreneurs with partnerships to the majority of the major recruitment database providers and an established on-the-ground presence in five countries, Roi-AI has quickly become one of the market-leading providers of marketing and business process automation platform to the recruitment sector.

[Click here to book a demo](#)