Daylite for recruitment professionals

Overview

This database template is designed for professionals working in the recruiting industry. Whether you are looking to speed up your workflow by using Daylite's powerful features or new avenues to successfully recruit for more clients and grow your business, this template is the starting point. If you are an experienced Daylite user, you can also benefit from this template by looking at the workflow and suggestions to enhance your productivity.

General Workflow

The following summarizes a general workflow for using this template.

1. Once you identify a prospective client, the first step is to create a new opportunity. Link the contact(s) and organization(s) to the opportunity. Assign a suitable pipeline to track the opportunity. Create tasks and appointments that you have to complete to win the opportunity.

2. When the prospective client agrees to your conditions and you decide to continue working, create a new project from the opportunity. As you link contacts, assign a role to identify the contact's main function in the project. Add a suitable pipeline that closely matches your workflow for tracking the progress of your project.

3. As you complete work in different stages, change the stages of the project pipeline to match your progress.

Opportunities

Opportunities represent the potential for new business. For example, in recruiting, the point where a candidate or company is in need of your services to get a job or hire an individual respectively indicates a new opportunity.

Once you create a new opportunity, you can link the necessary contacts/ organizations and assign meaningful roles. You can add the "New opportunity" pipeline in this template or create your own custom pipelines for managing opportunities.

Projects

In this template, a project is synonymous with a job or the hiring process. Generally, the goal for projects in the recruiting industry are finding the right candidate for a job or finding the right job for a candidate or both. All other items in Daylite have relevance with respect to the project.

You can track the progress of your projects using pipelines. In this template, we have the following pipelines for projects:

- **Campus recruitment**: This pipeline tracks all the stages involved in hiring candidates through campus recruitment.

- **Recruiting for employers**: This pipeline tracks the stages involved when a company approaches you to help them with finding suitable candidates for open positions.

- **Recruiting for jobseekers**: This pipeline tracks the stages involved when a jobseeker approaches you to help him/her with finding employment.

The Projects view is the most appropriate view to be in for all outbound activities. For example, once you set up a job, every activity you do (such as calling potential candidates, fixing interviews, and many others) will be with reference to the job you are working on. You can completely customize how you manage projects by setting up custom pipelines.

Contacts

Contacts are the people you work with in your business. In the recruitment industry, the contacts view is the most appropriate view to start with when you receive a phone call from a prospective client or someone approaches you to help them with finding employment. Create a new contact and fill in the details for that contact. If the contact works for a company, create a new organization, add the details, and link the contact to the organization. As you proceed further, you can add other specialized data for the contact such as category, keywords, role, and many others.

Categories and keywords

Categories are useful for classifying and dividing the items in your database. For example, in this database, you can use categories such as *Client*, *Competitor*, *Employee*, *Candidate*, and many others for classifying your contacts.

Keywords allow a more detailed classification of contacts, organizations, projects, and opportunities. They can be used to tag these items with descriptive words or phrases that will help you find the right data more easily. For example, contacts working in the recruitment field can be tagged with the keyword *Recruiting*. Or, all networking projects can be tagged with the keyword *Networking*.

Depending on how you wish to classify your data, you can set up categories and keywords that make most sense in your business.

The Activity tab

The Details pane for contacts, organizations, projects, opportunities, and groups has an Activity tab. This tab is very useful to gain an overview of all the activities that have occurred for the item selected and presents them in the same order as they occurred with the most recent ones at the top end.

For example, the Activity tab for contacts and organizations presents an overview of all the activities you have had with a certain candidate and company respectively (such as when you last spoke to them, viewing multiple notes in their date order, etc).

Roles

When you link contacts with organizations, projects, or opportunities, they are connected by a role. A role describes the kind of work or function someone has in an organization, project, or opportunity. The recruiting template has different kinds of roles (such as recruitment specialist, candidate, decision maker, background screening consultant, and many more) that you can use or you can create custom roles as needed by your business.

You can use the Title field to identify the candidate hierarchy in the hiring process. For example, a contact is linked to a project with a role "Candidate" and title "Pre-screening". In the linked view of the results pane, you can see a list of all candidates. Further, you can click the contact in linked view, the business card view highlights the Title (i.e., Pre-screening) to show where this candidate stands in the hiring process.

Forms

Forms allow you to collect and store information. Whether you are looking to ask a set of questions to prospective clients or record the employment history of candidates, you can use forms to capture that information. The recruiting template has the following forms that you can add to projects and opportunities:

- **Employment history in reverse chronological order**: This form is for collecting information about the previous positions held by a candidate and associated details.

- **References**: This form is for collecting information about people who can provide a reference for the candidate.

- **Questionnaire for new candidates**: This form has certain general questions you would ask new candidates and record their input for verifying their suitability for a position.

You can also create your own custom forms.

Activity Sets

Activity sets are useful for workflow that needs to be completed in the same order or is time sensitive. They reduce the need to manually create the same tasks and appointments for multiple projects of similar nature. This template has the following activity sets:

- **Campus recruiting**: This activity set has tasks and appointments that cover all stages of the campus recruiting process starting from requirements gathering to offering the position.

- **General recruiting 1**: This activity set has tasks and appointments that should be completed to enable a candidate that approaches you for help with finding a job.

- **General recruiting 2**: This activity set is similar to General recruiting 1 with very slight variations.

- **Recruiting for employers**: You can use this activity set when a company approaches you to find suitable candidates for filling open positions.

- **Recruiting for jobseekers**: You can use this activity set when a candidate requests your services for finding a suitable job.

- **New opportunity**: This activity set is useful for managing new business. It has a set of tasks and appointments that you should finish for winning a prospect over.

These activity sets come with pre-defined due dates. However, if you wish to use the activity sets feature without setting due dates for tasks and appointments, you could do so. In the Activity Sets pane of Daylite Preferences, keep the "Start: _____ Day(s) after start date" or "Due: _____ Day(s) before end date" blank.

You can create custom activity sets that are more suitable for your workflow.

Resources

There are a number of resources to help you to learn more about Daylite and provide answers when you have technical questions.

- **Daylite 101 certified training course:** Our certified trainers deliver this course regularly all over North America. To find out more about this course and our trainers, please visit http://www.marketcircle.com/daylite/training/.

- Our support website and knowledge base have many articles that can help you solve technical difficulties. Visit http://www.marketcircle.com/help/ for more information.

- We have interactive forums where you can share ideas, tips, and questions with fellow Daylite users. Marketcircle engineers, designers, and support staff also share their knowledge on the forums.