CareerPlug Site Visit Checklist

Dashboard

- [ ] Do they have jobs that need to be refreshed (Account Activity tab)
- [ ] Do they have unreviewed applicants (Account Activity tab)
- [ ] Review their Funnel Conversion - where are they getting blocked? (Hiring Performance tab)
- [ ] Are they logging in every day?

Applicants Page

- [ ] How many are in the Needs Review bucket?
- [ ] Are they utilizing their filters to prioritize and identify applicants in a timely fashion?
- [ ] Are they using bulk actions?
- [ ] Is the workflow customized on the applicants tab to improve efficiency with moving applicants through the hiring stages?
- [ ] Are they moving candidates to their pipeline for future consideration?
- [ ] Are they regularly making candidates inactive and sending rejection emails/marking rejection reasons?
- [ ] Are they marking their hires?

Jobs Page

- [ ] Is Job Title and Description in line with Indeed guidelines?
- [ ] Any duplicate postings?
- [ ] Are jobs refreshed?
- [ ] Do they need to have a passive job posting to build an applicant pipeline?
- [ ] Optimizations: Are they using scorable prescreen questions? Disqualify and/or Fast track types? Set up auto-send assessments?
- [ ] Are they sharing to custom sources and/or social?

Account Page

- [ ] Do they want to create custom interview scorecards, email templates, job templates, digital offer letters, keywords, or adjust their hiring workflow?
- [ ] Are their user notifications set up as needed?
- [ ] Do they want to adjust their default applicant tab filters or email settings? (My Profile)
- [ ] Do they want to use the calendar integration?
- [ ] Do they want to automatically send assessments for fast tracked candidties?

Reports Page

- [ ] Are they referencing any of the report charts on a regular basis to improve their hiring decision making and operations?
- [ ] Have they created any exportable reports and sending on a regular frequency?

Onboarding System

- [ ] Is it activated?
- [ ] Are their forms set up correctly? Do they know how to create/edit forms as needed?
- [ ] Are there checklists? Do they want to use a manager facing checklist as well?
- [ ] Are the appropriate checklists applied to the corresponding job(s) within the ATS?
- [ ] Do they need to customize their welcome email?
- [ ] Do they need to adjust their notifications?
- [ ] Do they know how to communicate with new hires?
- [ ] Do they know how to update employee information and onboarding data if needed?
- [ ] Are they checking the asks tab and staying on top of the process?
- [ ] Do they want to receive any reports?