User Guide for External Recruiters

Workflow Best Practices

The Basics

Workable is a hiring platform. If a client you're recruiting for uses Workable they'll invite you to collaborate.

Submit candidates and work together with your client to make the best possible hire.

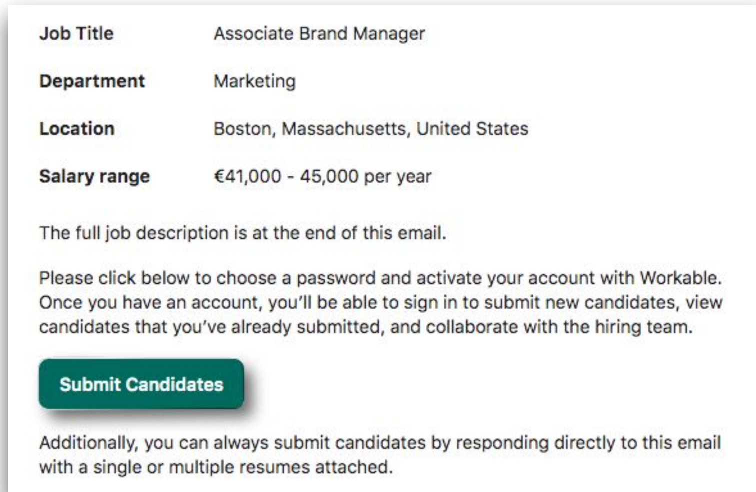
Contents

1. Joining a client's account

Your client must send you an email invite to submit candidates.

Accepting the invitation

You'll receive an invitation with the details of the job and a link to access the portal and submit candidates.

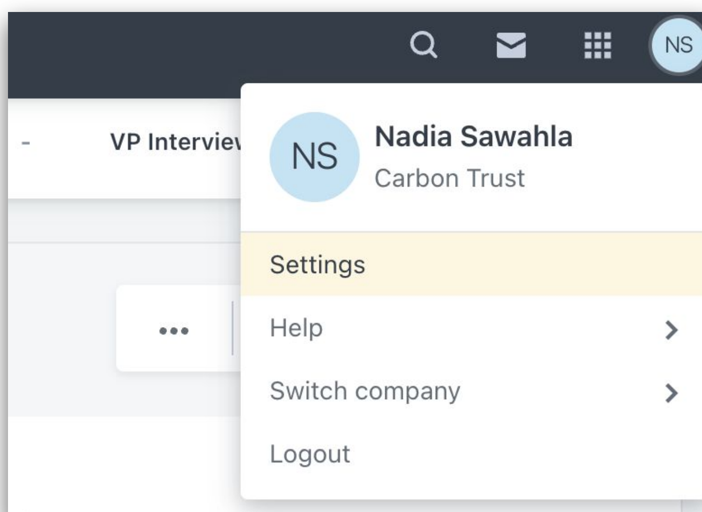


If it's your first time using Workable, you will be prompted to set a password and join your client's portal.

If you've used Workable at this email address before, simply log in with the same email and password: You can access multiple clients with the same login by clicking the profile icon in upper right and selecting the company.

Setting up your profile

Once you are logged in to Workable, click your user icon in the upper right to customise your personal settings.



There, you can add more details such as your signature for emails and your timezone for scheduled events.

You will also find settings for the notifications you'll receive about feedback your client adds on your candidates.

2. Navigating Workable

Use the different pages to see which jobs your client needs your help with.

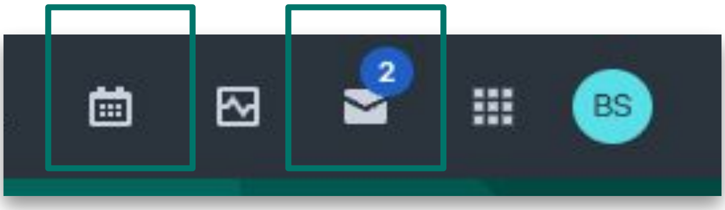
Jobs

Navigate to the Jobs page. Click on a pipeline stage to check the progress of your candidates through the client's recruiting process.

Inbox & Agenda

The inbox, accessed by the envelope icon, works like a 'to do' list. You'll see notifications about candidates that need your attention.

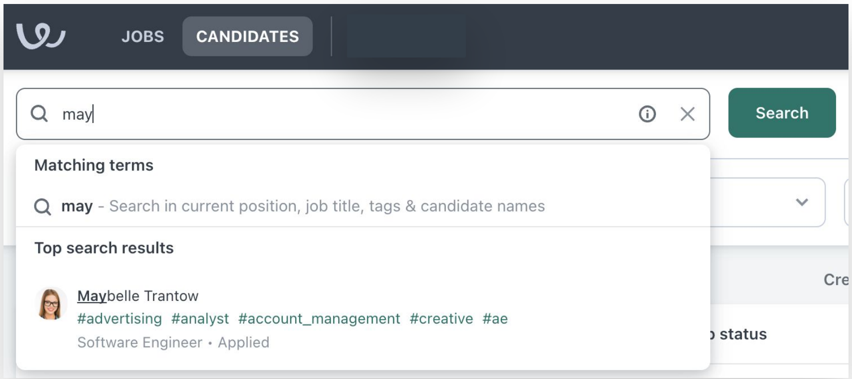
Access the agenda through the calendar icon at the top of Workable to see upcoming and recent interviews you're involved with.



Candidates & Search

In the Candidates section you'll find all the candidates you've submitted for your client, both for active and inactive jobs.

Use the search bar to look up specific candidates. Search by name, headline or any information in their resume.



3a. Submitting candidates

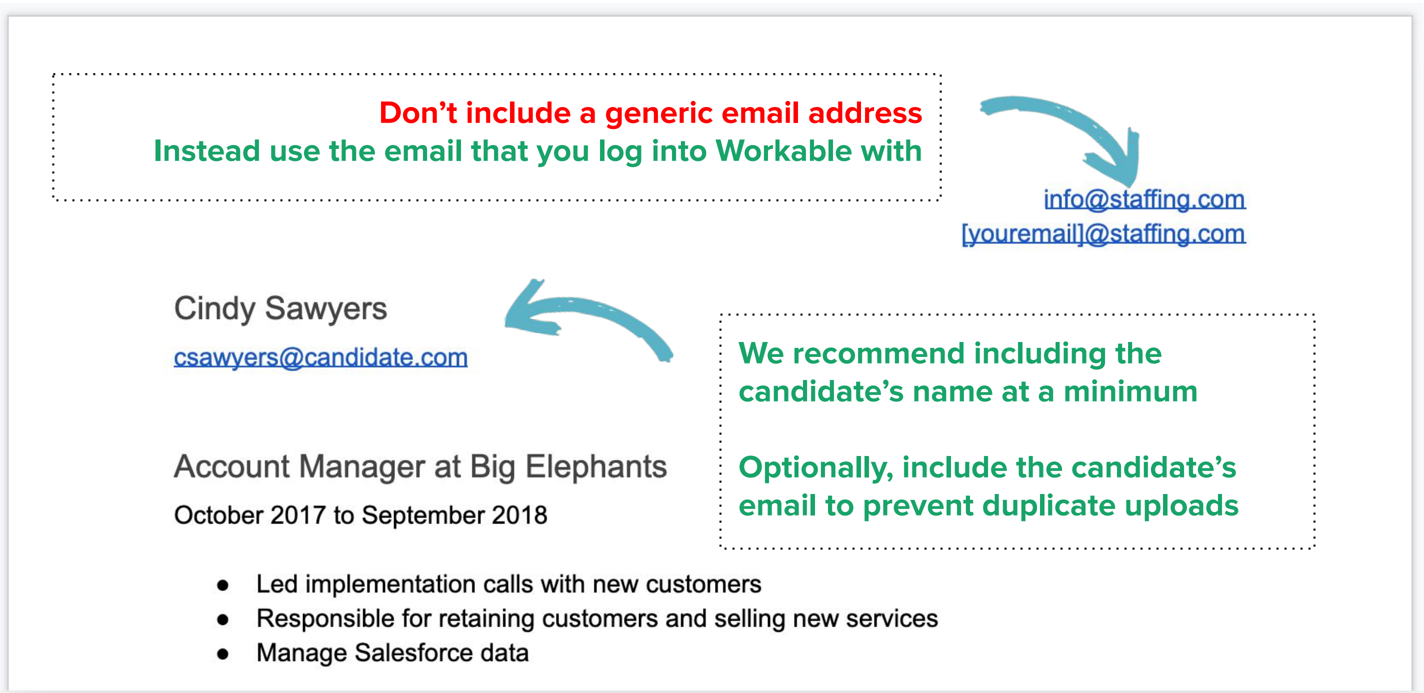
Important

When uploading resumes:

- ✓ Include the candidate's name to help your client verify that the candidate hasn't already been submitted
- ✓ If you include an email address, make sure to only include the email that you use to log in to Workable or the candidate's email
- ✗ Do not include a generic email address for your agency/firm

Choose either of the methods outlined in (3b) to upload resumes.

Resume example



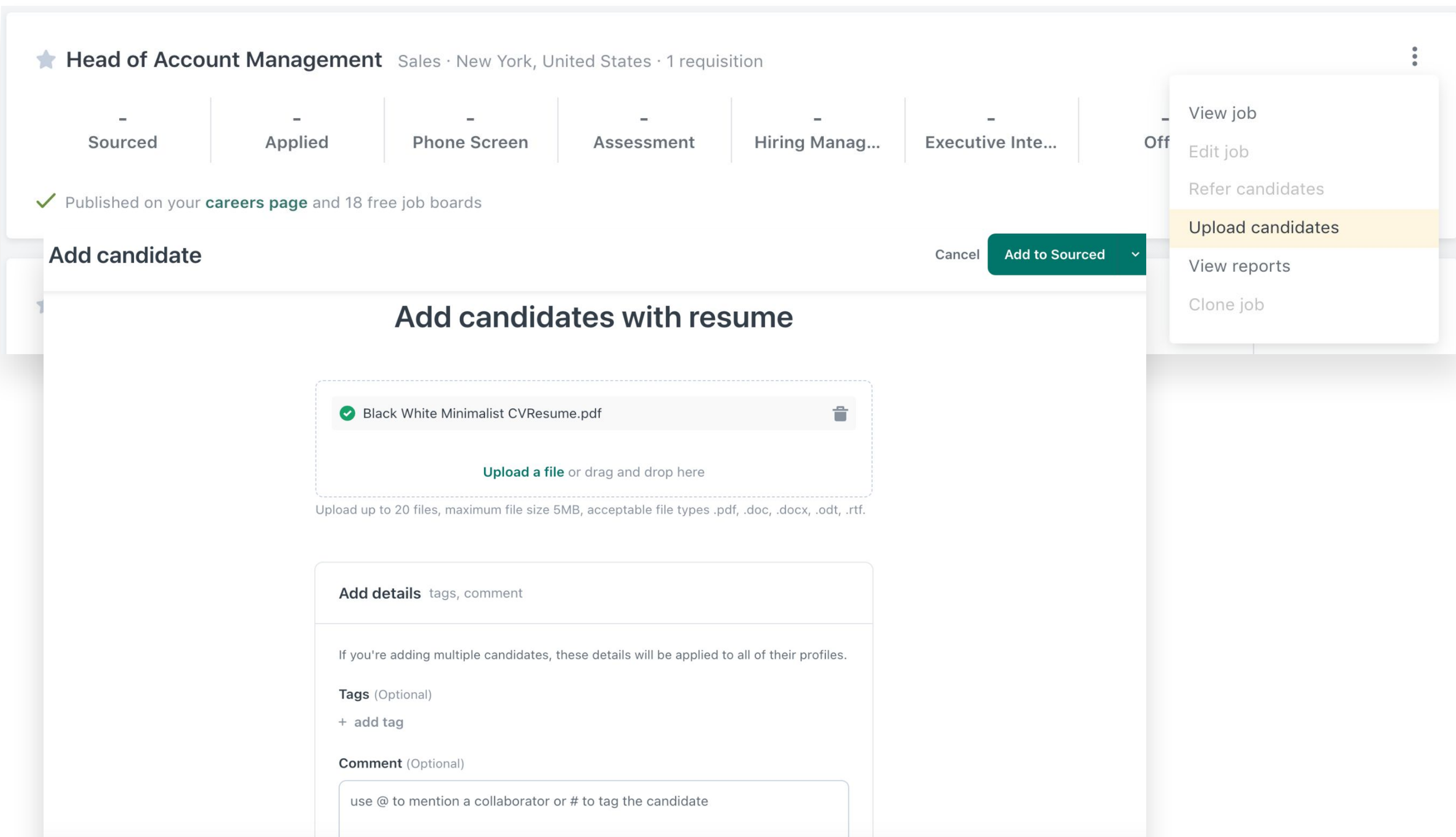
3b. Submitting candidates

Submit candidates under the Sourced and Applied stages of the job pipeline.

Upload in Workable

From the Jobs page, click on the contextual menu on the right side of the job you want to submit candidates for and select **Upload Candidates**.

Attach a resume. Add details such as tags or comments. If you're adding multiple candidates, these details will be applied to all of their profiles.



Upload via email

You can also simply reply to the invitation email you received from your client, attaching the resumes of the candidates you want to submit. Any text in the body of the email will be added as a comment for your client to review.

4. Tracking candidates

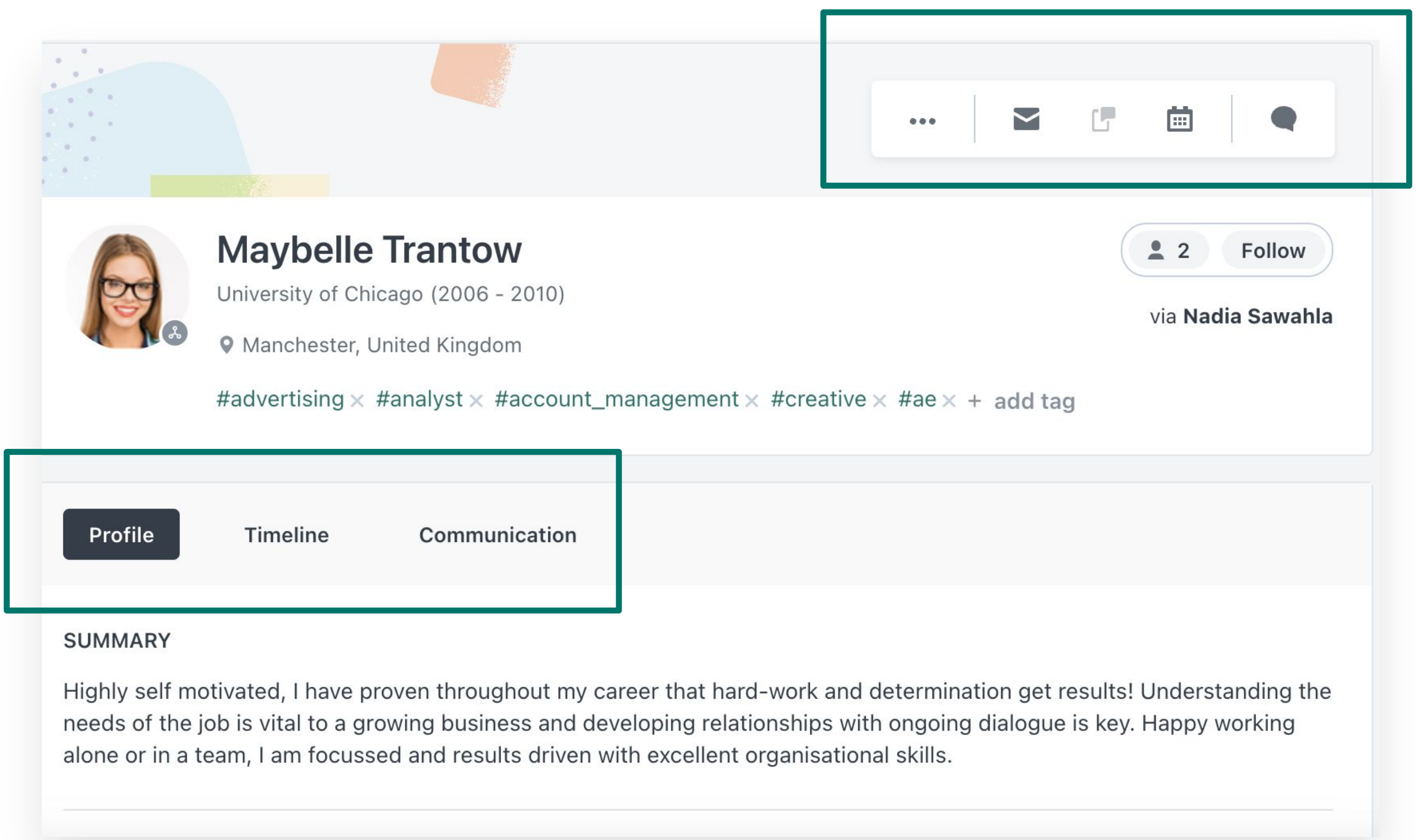
From the Jobs page click on any job stage to view the candidates you've submitted. On the candidate's Timeline tab you will see the collection of events that have happened since submitting the resume or use the individual tabs to review specific actions.

Comment

Add an internal note on a candidate's profile. Use this option if you need to communicate with your client. Type '@' and the name of the person you are working with to send a notification.

Emails and events

Send emails to the candidate and schedule events. The communication history will be stored automatically for your client to view.



Support when you need it

help.workable.com

support@workable.com

+1 (844) 657 7637
+44 (0) 800 086 8870
(3:00am - 5:00pm ET)

Live chat and access support resources by clicking your user icon and then "Help"