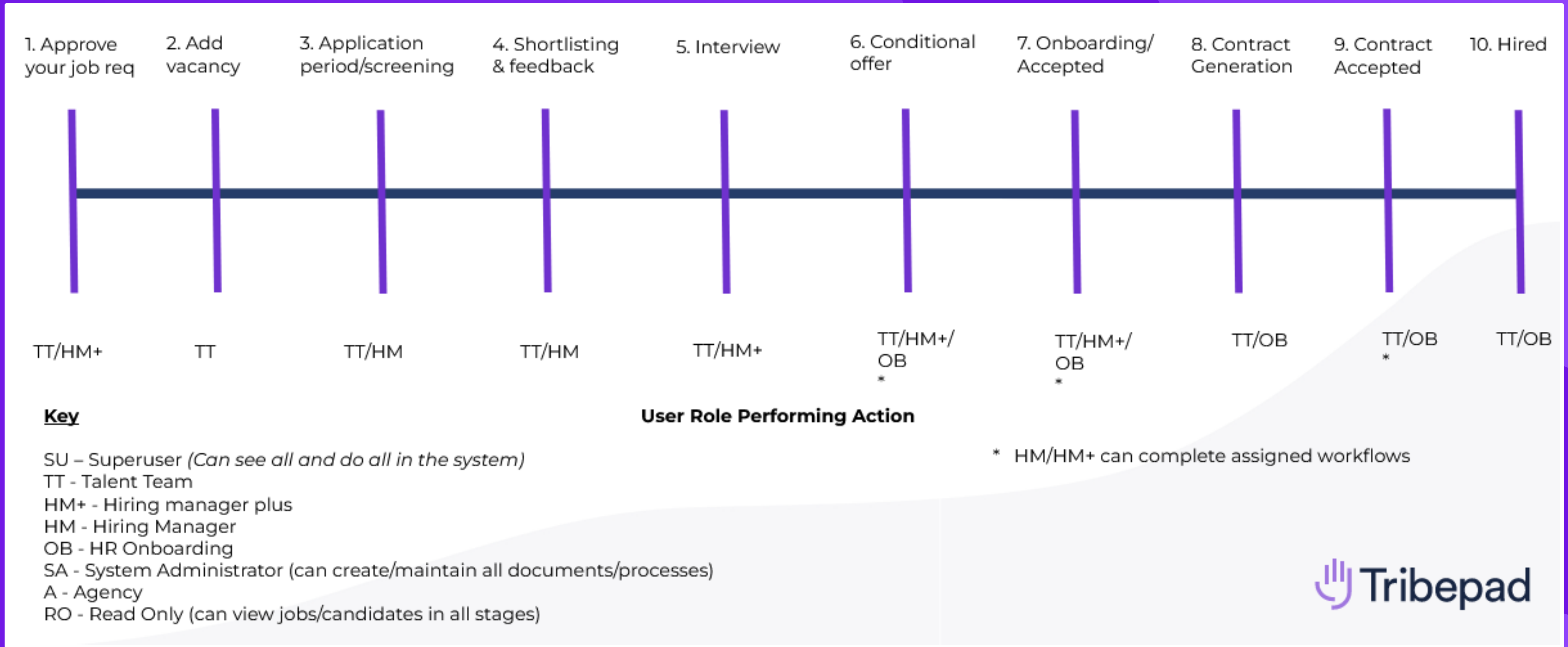
# Tribepad
# 10 Steps to Success

Tribepad Pro – Public – Feb ‘24

# What are the 10 steps to success

We've created this document to help you understand all the different features that are available at each step of the application process. Below is an overview of these ten steps.



# Step 1
# Approve a Job Requisition

Add Approvers to an Authorisation policy, dependant on your organisational requirements

Approval or Rejection can be given on a Job Requisition. Notes can also be added to give context on approver’s decision

Add policies to Job Requisition templates so that specific approvers are used as default

Superusers can override authorisation requests if required

Jobs cannot be created until a role has been fully approved

*Authorisation is a system wide on/off function within the ATS.

# Step 2
# Add a Vacancy

Create a Vacancy using a job template or as a stand-alone process.

Make your Job Adverts consistent and effective by using a Job Template

Add in elements to your application process, to gather the relevant information from your candidates at the right time

Incorporate your Diversity or questionnaire into your application process, so that you are guaranteed to capture that valuable information

Choose to request a CV upload from the candidate, or for them to fill out career or education history

Set specific interview processes for different roles if required

# Additional features within this stage:

- **Custom Notifications** - send custom emails and SMS to candidates and internal users, on a per-job basis, at specific points in the application process
- **Single Job Description formatting** – use a single box to format your Job package and description
- **Ad Assistant** – use our checker to make your adverts more accessible and effective
- **Anonymisation policies** – choose which elements of an application are made available to your Hiring Managers
- **Job Booster*** – choose the right Job Board to post your roles to. Pay a one-off fee for a set amount of time
- **Job Authorisation** – attach a policy with specific approvers, to authorise the role before it is published
- **Pronouns** – allow your candidates to choose which Pronouns best suit them
- **Vacancy Poster*** - post to multiple job boards simultaneously
- **Broadbean*** - post to multiple job boards simultaneously

* = feature incurs extra charge

# Step 2a
# Candidate Engagement

**Campaigns* (part of CRM)** - create Campaigns to entice candidates and communicate specific marketing messages with them

**Job Search site / Career Site Builder*** - bring all your vacancies together in one place for your candidates to easily access and apply to

**2-way communications* (part of CRM)** - send and receive emails and SMS directly from and back into the ATS

**Passive Candidate** - Add candidates as a 'Passive Candidate' if you only have partial information from them. Get them started with creating a full profile

**Talent Finder*** - import the best candidates from all the jobs boards you use every day, at the touch of a button

**Ad Hoc emails** - Send out emails based on templates, to candidates at any point in their application journey

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# Step 3
# Application Period / Screening

- Receive applications from candidates up until the closing date
- Candidates may be screened from within your internal database (your 'Talent Pool') and invited to or applied onto different roles
- Tag candidates appropriately, filter as required, save 'groups' of candidates together that fit certain search terms
- Set up questionnaires and make them part of the screening process for your internal users
- Make use of 'Killer Questions' to auto-process your candidates
- Protect your 'Time to Hire' figures - freeze recruitment activity for specific time periods using 'Stop the Clock'

# Step 4 Shortlisting and Feedback

Review your candidate's profiles and applications

Use the candidate's 'Mini profile' to review their whole application at a glance

Quickly identify candidates that have indicated a disability, as well a internal, external, agency, 'At Risk' and Passive candidates, via icons on their profiles

Use 'Process' (internal) questionnaires to capture feedback from internal users

Make use of candidate anonymisation to reduce unconscious bias from your Hiring Managers

# Step 5
# Interview

Set up and rename specific interview stages via ‘Manage’, our self-serve tool

Invite candidates to specific interview slots or allow them to book their own from a selection

Use ‘Panel Scoring’ to gain feedback from multiple interviewers

Invite your candidates to different types of interviews, e.g. Pre-screening call, Teams/ virtual interview etc.

## Additional features within this stage:

**Office365 / Google calendar integration*** – sync up your Office365 or Google calendar with your ATS

**MS Teams integration*** – send Teams invites directly from your ATS

* = feature incurs extra charge

# Step 6
# Conditional Offer

Generate an offer letter to your candidates (using letter templates)

This may be conditional or may include a contract at this stage

# Step 7
# Contract Generation

Generate contracts from the system via the use of templates

Include snippets, variables and images in your contract

Send out contracts and offer letters together, if you have not already done so

Candidates can request changes or reject the offer at this stage

**Additional features within this stage:**

**Contract Authorisation** – send your contract for review before it is sent out to the candidate

**E-sign*** – Tribepad's answer to Docusign – allow your candidates to electronically 'sign' a contract

* = feature incurs extra charge

# Step 8
# Onboarding

- Create Onboarding packages and trigger specific actions for candidates or internal users
- Decide when users and jobseekers will be contacted - automatically or by manual invitation
- Send documents, policies, videos, reference requests, questionnaires and dategap requests
- Add your Onboarding items into a checklist so all completed and pending actions can be seen at a glance
- Add notes onto your Onboarding candidates' profiles - make them visible for all internal users or keep them just for your eyes only
- Set Download policies against a package so that specific information can be downloaded as required

## Additional features within this stage:

- **Integrations with Onboarding*** – if you have any integrations which you would like to trigger at different stages in the application journey, you can trigger them as part of the Onboarding process

* = feature incurs extra charge

# Step 9
# Accepted

Move your candidates to the 'Accepted' stage once they have accepted their contract

Trigger other Onboarding processes at this stage, e.g. uniform ordering, IT equipment requests etc.

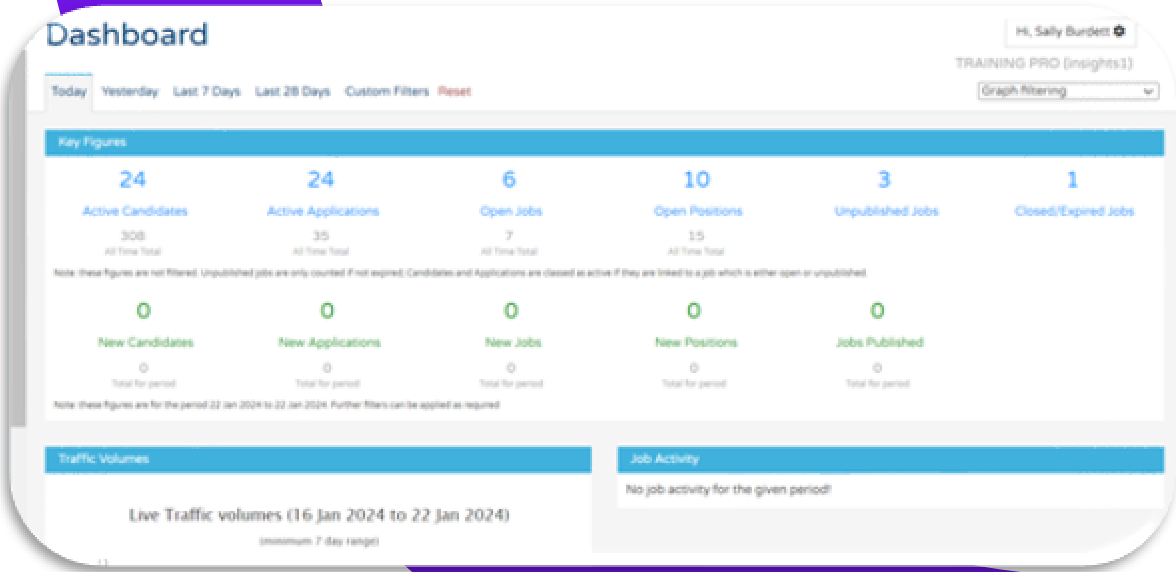
# Step 10
# Hired

- Move your candidate to ‘Hired’ (manually), once they have completed all Onboarding processes
- ‘Time to Hire’ and ‘Time to Fill information can be pulled out of Insights, Tribepad’s reporting suite
- The candidate will then stay in the system until they are automatically deleted (based on your own data retention rules).

# Other areas of the platform

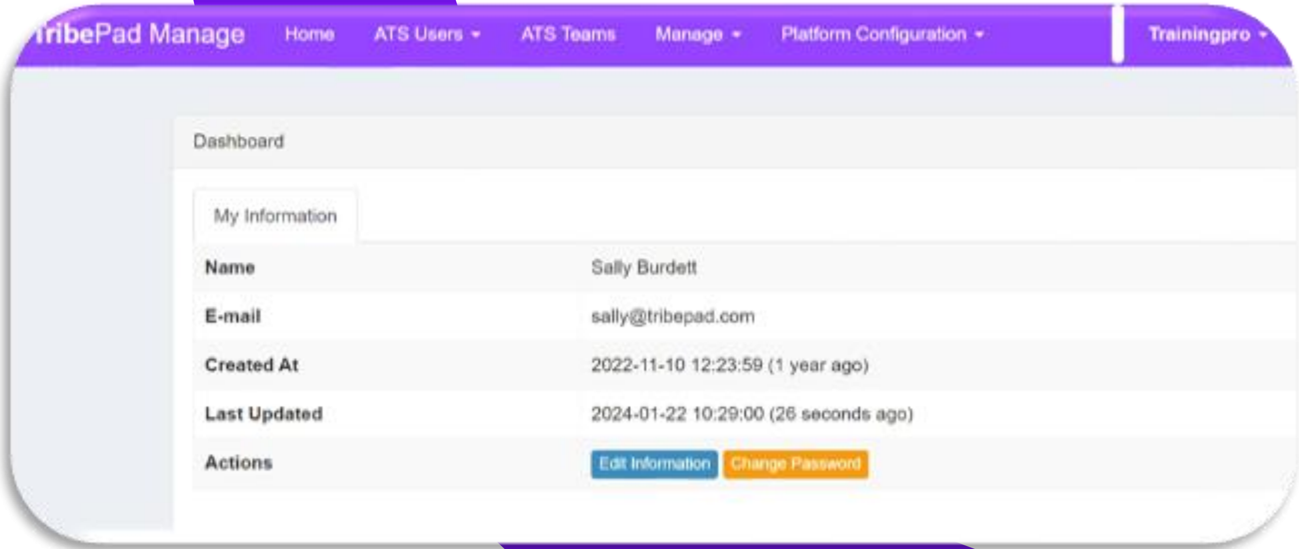
# Insights

- Utilise around 70 pre-built reports and pull out the data that you want to see from the platform
- Amend the existing reports to only show what you wish to see
- Export data as a CSV file, and save and schedule reports to drop into your inbox whenever works for you
- If the pre-built reports don't work for you, build your own reports
    - Bring in questionnaire responses by building a 'Custom Column Set'
    - Export encrypted Onboarding data securely (e.g. bank details, National Insurance information) via SFTP
    - Add in output rules to columns to make the data perform in a way that works for you



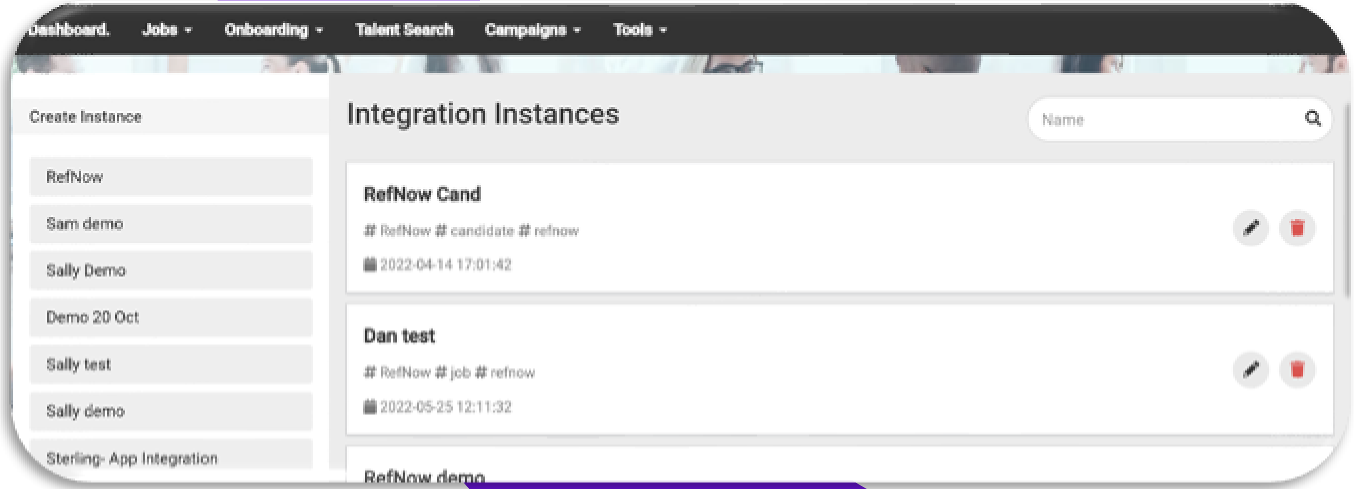
# Manage

- Self-serve ATS amendments through your ‘behind-the-scenes’ tool, Manage
  - Amend the emails that come from your platform
  - Change the content that users interact with
  - Customise your interview and application process workflows
  - Set your Data Protection and Data Retention rules for your platform



# Integrations

- Seamlessly bring in existing partnerships to work with Tribepad
- Trigger integrations automatically without the need for manual input
- We work effortlessly with renowned companies such as:
  - DocuSign
  - RefNow
  - Arctic Shores
  - VeriFile
  - Sterling
  - Microsoft - Office 365 and Teams



# APIs

- Allow your alternative organisational software to work with Tribepad by setting up APIs
- Access our API Portal for documentation
- We can support APIs which focus on
    - External Applications
    - Retrieve Applications
    - Simple Job Create
    - External Career Sites
    - Options Values
    - Candidate Custom Fields