Sourcing Strategies, Process & Tools
best practices overview

Glenn Gutmacher

Founder, Recruiting-Online.com & Co-founder, Boston Area Talent Sourcing Association

Connect on: LinkedIn, Google+, Facebook, Twitter

(508) 930-9391

glenn@recruiting-online.com

Glenn Gutmacher:

- At Avanade since 2010, managing offshore sourcing team supporting North America, and lead a number of strategic online sourcing strategies and global training

- VP of Arbita Consulting & Education Services (2008-2010)

- Senior Sourcer at Microsoft (2005-08) & Getronics (2003-05)

- Pioneering Sourcing trainer and methods since 1997

- Founded JobSmart in 1996, greater Boston's 1st regional career portal (owned by a major newspaper chain)

- Co-founder, Boston Area Talent Sourcing Association (2014-present)

- Founder, Recruiting-Online.com sourcing training

- Yale University graduate, started out in Broadcasting

New Sourcer Training Best Practices

1. Have a robust onboarding plan ready (broken down by day; run 30+ days out)

2. Review plan with each sourcer and ask they share both strengths and areas they want to improve

3. Line up your internal SMEs & spread out ownership of training components

4. Review training materials for clarity and consistency

5. Create a "mentoRing" for each sourcer of assigned go-to people for each of 8+ different key topic areas

6. Get sourcers to own their training (self-guided exercises, check-ins to insure absorption / progress, schedule time to listen to veterans' phone screens)

7. Encourage questions frequently in early-going

8. Expect to repeat topics that didn't resonate initially due to lack of contextual exposure (but can go deeper now!)

Sample onboarding topics:

- Who owns what? (beyond org chart)

- Our company business

- Our hotskill profiles

- How to read a resume

- Eliciting candidate top motivations

- Customizable standard email & phone templates

- Browser configuration and tools

Onshore & Offshore Sourcing Models

Offshore:

• Best for: active channel processing (e.g., job board resumes), online research (e.g., building out name lists), outreach (if using standard templates), and administration (e.g., ATS candidate data entry and updating).

• Because of the distance and timezone differences, make sure to have a request tracking system (a Sharepoint site with built-in templates is much better than email, though IM and email can supplement for clarification)

• Expect to spend a lot of up-front time training and providing constructive feedback on submits. It's worth the investment: they do get better over time.

• Have an on-site manager you can trust to help manage.

Onshore:

• Pods model (used at Microsoft, etc., described well [here])

• Sourcer-recruiter (works well only if most online sourcing is off their plate – e.g., offshored)

Vendors:

• All major RPOs have this service

• Some independent offshore ones recommended to me (many offer a free trial) are:

  • Employvision
  • KeyResourcing
  • PSG
  • Tammina
  • vsource

ATSs and Recruiting CRMs

- Challenge: ATSs are built for applicants and what happens next, rather than pre-applicants and what happens before.

- So much data you want to track (social network URLs, blogposts, articles mentioned in, etc.) to help with engagement that ATS administrators fear will bias you against candidates and violate EEO guidelines.

- No easy way to reach out in a way that increases the level of engagement (alerts + template correspondence = clunky).

- CRM-lite in your ATS workaround? Sourcing reqs!

Vs.

- Many CRM systems geared to sales/marketing, relatively few for recruiting.

- Salesforce.com learned it required a lot of customization.

- Avature and Smashfly decided to build from scratch.

- Avoid abandoned shopping carts: Capture less data up front, gather more over time

- Use honeypots that add value

- Better referral/path tracking

- Workflows where prospects can be processed differently based on various characteristics

Diversity Sourcing (part 1)

- Diverse fraternities/sororities: Black females (e.g., Alpha Kappa Alpha), Black males (e.g., Alpha Phi Alpha). Latinas (e.g., Kappa Delta Chi), Latinos (e.g., Omega Delta Phi), Asians (e.g., Lambda Phi Epsilon is a cross-national Asian fraternity; Beta Chi Theta focuses on South Asians). See NMGC for multicultural Greek organizations and NALFO for just Latino ones.

- Universities: the majority of alumni of the 100+ Historically Black Colleges and Universities (HBCUs) are African-American, there's a Hispanic US college association list and over 40 women's colleges. Search through these websites using the site: command to find relevant points of contact, or use school names in resume or profile searches.

- Professional associations: acronyms are good keywords, such as NSHMBA (National Society of Hispanic MBAs), SHPE (Society of Hispanic Professional Engineers), NBMBAA (National Black MBA Association) or NSBE (National Society of Black Engineers), etc.

- Build strong relationships with trustworthy groups (in person & virtual); need not be expensive.

TIPS:

- Add (HER OR SHE) to any search to find just women

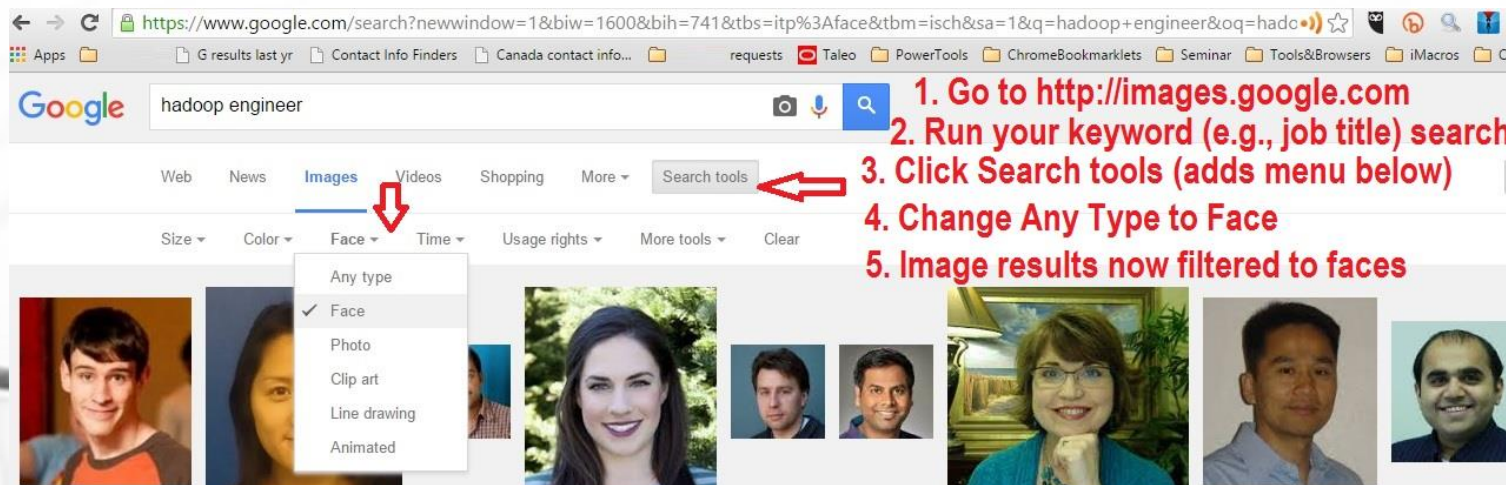Leverage LinkedIn's generous 2,000-character field input limits to find:

- Members and alumni of dozens of these groups in a single search (e.g., enter *all* the African American fraternity names in the Keywords field)

- Women candidates by adding a slew of girls' names in the First Name field, along with your normal search criteria

6

Diversity Sourcing (part 2)

- Ethnicities: "natural phrase" keywords put in an OR clause such as ("African American" OR "Asian American" OR "Latin American") added to a string of professional/educational associations can be effective in expanding results.

- Languages: combine with natural phrases like "native Spanish", "fluent Korean", etc. Searching for "Cantonese" and "Mandarin" is a great way to find Chinese candidates because typically only native speakers list both on a resume. This works well for other ethnicities that commonly speak multiple languages (e.g. "Hindi" and "Urdu"). Also try the native spelling of a language as part of a search: e.g., Español CPA Miami FL (he OR she).

TIP

- Use Google images search with Faces filter to limit results to pictures of individual people (see screenshot below left)

- Combine with strings that target company team members (people, staff, bio, profile, etc.), combined with aforementioned diversity terms and job titles, or even a specific company.

- Click here for an example of search terms and results.

1. Go to http://images.google.com
2. Run your keyword (e.g., job title) search
3. Click Search tools (adds menu below)
4. Change Any Type to Face
5. Image results now filtered to faces

Search String Libraries

- It's one thing to save searches in your job boards, LinkedIn, general search engines, etc.

- But you need a central repository for all searches across a team (saves time from reinventing the wheel for turnover, reassignment, and insuring robustness).

- Excel is recommended to avoid smart character autoformatting. Besides actual string, include filterable columns for: business area, hotskill, location, destination format, # of results, # relevant, % relevant, and other comments.

- Encourage contributions (additional or revised strings) and reward them! (also see sourcer Gamification methods at SAP, etc.)

- Save it to a Sharepoint site or any platform that allows versioning so you can revert if someone inadvertently uploads bad edits.

TIP:

Divide # of results by # relevant results to get the string quality (% relevant).

Sort your spreadsheet by this column to discover your golden search strings!

Sourcing Metrics & Tracking Success

- Most organizations start at the submission stage (# of submits per week, submits accepted for interview, etc.) and run through offer accept rate (de-emphasize hires!).

- But I would recommend earlier *if* it doesn't add significant admin burden to the sourcer (i.e., use tools with built-in reporting like TalentBin, LinkedIn, InsideConnector):

  - # of call attempts

  - # of emails and inmails sent

  - # of responses

  - And even % relevant from your search string library

Your reporting deliverables should vary based on the recipient:

- Senior management: dashboard not report, less frequent (monthly or quarterly), focus on trends (overlaid line graphs), and green/red indicators

- Day-to-day management: more frequent (weekly), more activity detail (Excel + graphs)

- Send a couple of days ahead of your normally-scheduled call so they can prepare questions and you can review key points while still fresh.

9

Keeping Up on News, Tools, etc.

The previous slide begs the topic of how you stay on top of the information flow without being overwhelmed.

- Like digest mode for discussion lists (use for LinkedIn, Google and Yahoo groups), some news compilers will send a consolidated email to your inbox (e.g., Owler, Nutshell Mail).

- TweetDeck or Hootsuite as a real-time dashboard for social network content

- Get an RSS reader or RSS in Outlook (see next slide) for everything else

TIP:

Leverage all your team members: each person owns a different subtopic and prepares to share their faves with the team in a rotating mini-training series during regularly-scheduled meetings.

Benefits:

- Scales learning process
- Buzz for such communities of practice attracts new members
- Builds presentation skills
- Uncovers potential leaders
- Retention tool
- Evolve → center of excellence

RSS feeds to Microsoft Outlook

RSS feeds can be processed like emails in your email program:

- Outlook 2007 or newer on Windows version only (not available on MS Office for Mac but there is a workaround: let a Windows colleague save the feed and use an Outlook rule to forward you the results).

- RSS reader integrated so feeds can be processed just like emails: Right mouse click on RSS Feeds folder, select Add a New RSS Feed, and enter the RSS URL (see at right)

- Convenient way to stay informed (don't need a separate news reader app)
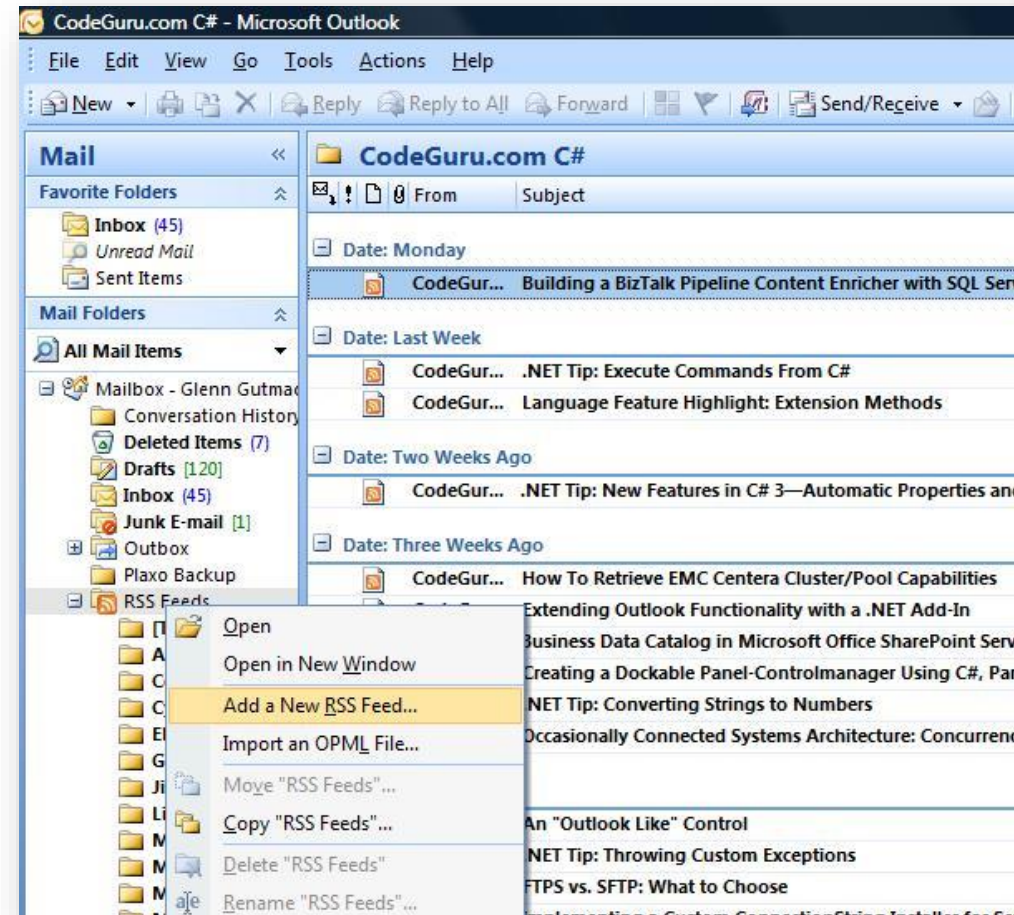
Editorial Calendars

Building on Sourcing Automation bullet #5, it's vital to maintain relevance and a

cadence in your internal and external communications. You lose:

- top-of-mind awareness if your content is too infrequent

- organic forwarding is your content is too careers-focused and not about what matters to your audience

Work with your Marketing department to sync with what they do to amplify the

effect. (Our marketing team pushes out a "What's Social This Week" email with

retweetable content in a "click to post" format.)

Examples: Disney uses #WaltQuoteWednesday, while Dell has #MondayMotivation.

Such status updates helps give structure to your posting calendar and gives fans of

your careers page more reasons to revisit (see section 6 of this post).

Sourcing Automation

Several categories of activities lend themselves to automation. If you do something more than once a day, think about how to automate it:

1. Repeated emails? Use Outlook QuickParts and alternate email signatures

2. Repeated typing? Use a macro program such as MacroToolWorks

3. Repeated searching? Use bookmarklets + next slide, or even your own custom browser in Chrome (Chromium) or Firefox (FEBE)

4. Repeated data processing? Use Excel VBA macros + Web scrapers (see this intro video to latter and my Outwit Hub how-to, the most-watched video on SourceCon in 2014)

5. Repeated posting? If you lack a CRM, use Dlvr.it for feeds and HootSuite for ad hoc.

6. Repeated calling? Try RecruitDialer

Chrome extensions are the buzz (some of my likes):

- Broadlook Capture: spiders multiple people on page and researches info

- Connectifier (Chrome, Firefox, IE) shows other social networks and contact info when viewing a profile (e.g., try with Indeed resumes)

- Prophet, 360Social, Connect6, PeopleGraph are similar.

- SellHack (also try its free beta X-Ray search engine with contact info tool)

Automation: Easy Web Search in Chrome

The free Chrome extension Search Bar allows you to have a large number of custom search engines in a toolbar format

1. Once installed, click its magnifying glass icon in the top browser (extensions) bar to open Search Bar.

2. In the Search Bar, click the settings cogwheel at far right to open the custom search options/help page.

3. Now just run the type of site search you want to add (Bing, Google, etc.), copy the URL and note where your variable text appears. For example, the boldface portion of this: http://webmii.com/people?n="glenn%20gutmacher"

4. On Search Bar's options page, click "Custom searches" in the left-hand column, then click the gray "show advanced options" button

5. Add site name under Description, paste in the search URL but replace the variable part with %s (so the above would be http://webmii.com/people?n="%s" (Home page, Icon and other fields are optional –can leave blank). Click gray "create new" button to save previous.

6. Type your keyword(s) in Search Bar's text field, then click your button to run it!

A more interesting example for Github members in MA:

https://www.google.com/search?q=site:github.com+%22joined+on%22+%22**s**%22+(%22boston%22+OR+%22,+ma%22+OR+%22Massachusetts%22)+%22%22+-intitle:%22at+master%22+-inurl:tab+-inurl:jobs+-inurl:articles&filter=0

Custom sets of Bookmarklets

Bookmarklets are browser favorites on steroids: not only can they take you somewhere on the Internet, but they also *do* things. Thanks to embedded Javascript, they run any custom search like the previous slide and more, and work in any browser (Chrome, Firefox, IE, etc.).

1. Use [Bookmarklet Combiner](#) to create private or shareable sets free. (Install my free public set from [here](#).)

2. In the first section ("1. Enter bookmarklets"), type a logical bookmarklet name in the Name field and paste the full JavaScript code in the URL field (see next slide for a few basic but useful examples of JS-formatted bookmarklets to use)

3. Repeat previous steps with additional bookmarklets (click gray "Add another" button if you want to save a larger set)

4. Section 2 determines how you want to display/run them.

5. Section 3 is where you name this *set* of bookmarklets

6. In the "Result" section at the bottom, click Save button, then mouse-drag the bookmarklet set button onto your browser's bookmarks/favorites bar to make it accessible there (you can move it later to a subfolder if desired).

7. If you share the URL of your bookmarklet set, others can drag yours into their browsers, too!

Basic useful example bookmarklets

Find WhoIs for a domain:

```
javascript:var%20s;if(window.getSelection){s=window.
getSelection();}else{s=document.selection.createRan
ge().text;}var%20t=prompt('Enter%20root%20domain',
s);if(t){void(location='http://whois.domaintools.com/'
+escape(t)+'/');}else{void(s);}
```

Find contact emails by domain:

```
javascript:var%20s;if(window.getSelection){s=window.
getSelection();}else{s=document.selection.createRan
ge().text;}var%20t=prompt('Enter%20rootdomain%20a
fter%20@',s);if(t){void(location='http://www.google.co
m/search?num=100&hl=en&newwindow=1&q=(conta
ct+OR+email)+*%40'+t);}else{void(s);}
```

Github C# profiles by location:

```
javascript:var%20s;if(window.getSelection){s=window.get
Selection();}else{s=document.selection.createRange().text
;}var%20t=prompt('Enter%20location%20name%20for%20
C%23%20Github%20profiles',s);if(t){void(location='https://
github.com/search?q=location%3A'+escape(t)+'&type=Us
ers&ref=advsearch&l=C%2523');}else{void(s);}
```

Email-Format.com (enter domain):

```
javascript:var%20s;if(window.getSelection){s=window.get
Selection();}else{s=document.selection.createRange().text
;}var%20%20%20t=prompt('Enter%20root%20domain%20a
fter%20@',s);if(t){void(location='http://www.email-
format.com/d/'+escape(t)+'/');}else{void(s);}
```

Plan & Organize

- Block out activities in your calendar like:

    - Making new cold calls or networking calls

    - "Sourcing hour" for online research (not phone)

    - Returning voicemails

    - Replying to non-urgent email

    - Training time (e.g., learning a new tool)

- Use Folders, Favorites, and Templates

- Use an evolving Research Form to plan sourcing

- Control your Inbox with filters

- Bcc: yourself on messages you want to keep, then delete your Sent items folder periodically

- Use color categories to facilitate searching (applies to messages, calendar items, contacts and tasks)

Future Sourcing Trends

1. Everything you consider innovative now incremental improves in usability and speed (e.g., Web scrapers more user friendly, non-Boolean search tools more accurate, easier ways to distribute content widely, etc.).

2. Big Data fulfills its promise in dashboards: easier to get detailed and meaningful summary reporting from all internal activities (initial talent ID & call attempts through offer/hire) and external data

3. Know your ROI: greater detail on channel effectiveness, traffic sources, PPC, etc., to make better decisions

4. Recruiting CRMs more universal as price drops & become truly bi-directional with ATSs (government rules will discourage single-tool solutions)

5. The next disruptor will probably be in the what-replaces-the-resume space or effective prediction of candidate's likelihood to move

6. Dedicated diversity sourcing (too much to expect "regular" sourcers to fulfill Rooney Rule)

7. As virtual work rises, must tap different talent pools (alternate metros, etc.)

8. Alerts on candidates + more scalable candidate communication + easier/more ways to apply = better candidate experience & flow

9. More multimedia (on career websites, in job postings, video interviewing, email, etc.).to help stand out and boost engagement.

Sourcing Innovators

Rather than point to general "thought leaders", I find it's best to review examples of best practices and talk to the people behind those. Some of many examples…

Training vendors:

- Scalable sourcing training platform: Shally Steckerl, Sourcing Institute

- Video-based sourcing learning and integrated tools: Johnny Campbell, SocialTalent

- Phone sourcing: Maureen Sharib, TechTrak

TIPS: Read what's hot on SourceCon, key FB groups, blogs of everyone listed here & ask your team for their faves!

Practitioners:

- Internal sourcing gamification: Matt MacDonald, SAP

- Disciplined approach to sourcing data collection and analysis for incremental improvement: Glen Cathey, KForce

- Sourcer ➔ self-taught programmer: Mike Notaro, Accenture, John Turnberg, Apple

- Tools/Extensions: Dean Da Costa (& his Friday Tool Tips)

- Leveraging APIs: Aaron Lintz

Despite all the tools, what you still can't find is home contact info. Or can you?

Kudos to free tools like Prophet and Email Hunter that make it easy to find someone's work email when viewing a social network profile (my free 3-tab email bookmarklet gives 3 other ways).

If not provided, go to the company website for the main phone, then ask for the person by name.

But what if the gatekeepers are difficult and you want their *personal* email and phone (mobile or home)?

Broadlook Capture, SellHack, etc. (and particularly Connectifier) are also useful, but they don't always get what you need or there may be a cost. So get ready…

For many more examples of how to source personal contact info besides the slides that follow, see my SourceCon Dallas Sept. 2015 presentation

Sleuth the Pipl results

Uzma Azim – we know the person is somewhere in Dallas metro, but where?

1. Use the LIR bookmarklet to indicate location is Plano, TX 75023

2. Several results from Pipl.com, also indicating Allen TX and the name Uzma A Azim (middle initial proves to be very helpful later!). Googling distance allen tx to plano tx (only 12 min. apart, so either could be valid)

3. None of the Facebook results in Pipl indicate a US location, except one with no location lists under the "Likes" section the "AKF Dallas partnership", indicating she's the local one!

4. None of the GooglePlus results in Pipl indicate a location, either, but on one of them, click the "34 people" in her circles link and you see at least 2 who indicate they work at Nerium (Cheri Eaklor & Billy Nguyen), and that is where she works! So I add her to my GooglePlus circles to mark her profile.

5. Now test possibilities with the Email Permutator excel file with Gmail compose: firstname.middleinitial.lastname@gmail.com is a match!

6. What about home phone? Google "uzma azim" ("allen, tx" OR "plano, tx") -site:linkedin.com

7. The only result with a local phone is on LocateFamily (do Ctrl+f to find Uzma on the page) and it's in Plano TX 75023, (Whitepages bookmarklet says this is a mobile # so this is likely still a valid phone!)

Gravatar + expired domains can help

What home info can we find for Richard Hopkins?

1. LI Recruiter indicates Huntington Beach 92647

2. Google his name and location (both in quotes)

3. MyLife has partly blinded addresses; currently $1 for 7 days of unlimited searching.)

4. But unblinded in 2 other results (see right)!

5. Under Additional Info on his LI profile, it says: blog http://souladin.wordpress.com/

6. We find several social links (use Pipl if you lack Connectifier): Twitter, Github, Google+

7. But the About Page on his blog links to his Gravatar profile which is the best, as it shows the personal email!

8. Googling "richard hopkins" "92647" also yields step #4's results:

   a) FindUsa.com result has a home address and phone that matches the MyLife and LI address (landline #)

   b) STATS∞ - SOULTECHOC.COM Domain Name Info has the same name/address with a different phone (mobile #) and on the actual linked page we see the email matches what we found on his Gravatar page, which confirms this is (was) his domain. This is good info because the regular whois search for soultechoc.com shows the domain was sold and has no info!

STATS∞ - SOULTECHOC.COM Domain Name Info
www.statsinfinity.com/domain/Q-tmyLJlvnFaJb5J0iocJg.._info.html
2013-05-04 Administrative Contact: SoulTech Richard Hopkins 16761 Scotsdale Cir
Huntington Beach, CA 92647 US Phone: +1.7142229771 Email: Email of ...

16761 Scotsdale Cir, Huntington Beach, CA 92647 - USA.com
find.usa.com/92647-ca-huntington-beach-16761-scotsdale-cir.htm
16761 Scotsdale Cir, Huntington Beach, CA 92647 ... All Mary Buckels in CA | USA.
Richard Hopkins 714-842-6394. Get Full Info. All Richard Hopkins in CA | ....

LIR is even more specific in Canada...

How would you find the home phone (and address) for [Rosine Fenjiep](#)?

1. Using Canada LIR bookmarklet on Montreal Canada metro name hyperlink to depict it on Google Maps, we see it's on Rue Filion in Laval, QC H7L 2W3.

2. Using Pipl search, we find the result mentions an "ADDITIONAL NAME" of Rosine Fenjiep Tchakountio with two phones beginning with valid Montreal area codes 514 and 450.

3. Pipl also links to her Facebook profile so we have a backup to reach her (which is good, because the Email Permutator does not find another matching email) and FB also confirms her last name is Tchakountio, so Fenjiep is probably her maiden name.

4. Since we believe she is in Quebec, test both of these phones with Whitepages phone bookmarklet: the 514 # is a mobile # near Montreal, and the 450 # is even better because it shows it's a landline (home phone) associated with R. Tchakountio (that is her name!) and the address shown is on Rue Filion which matches step #1 exactly!

Cool sleuthing for mobile phone...

For Kyle Kingsbury, you can find social profiles (Facebook, Github, GooglePlus, Twitter) – particularly fast with Connectifier -- but normal phone searches are not finding any home phone.

1. HOWEVER, note the education section of his profile calls out his fraternity, which is a good sign he had an officer role as a student:

> George Mason University - School of Business
>
> B.S., Decision Science and Management Information Systems, Accounting
>
> 2003 – 2007 Activities and Societies Sigma Phi Epsilon

2. So Google "sigma phi epsilon" "george mason" "kyle kingsbury"

Only 2 results but this is one: while this doc won't let you do find-in-page, if you scroll far enough, you get to this:

> *"I am the president of the Virginia MU chapter of Sig Ep at George Mason…. please call me directly at 703-609-8707*
>
> *Best of wishes, Kyle Kingsbury Sigma Phi Epsilon - President '07"*

3. So that matches by name, fraternity, college and year! And Whitepages shows this is his mobile!