

Full-Cycle Recruitment for Client Roles

This SOP explains the steps for filling a client role, from the first intake call to the new hire's 30-day check-in.

1. Purpose

To give recruiters one clear way of working on client roles. Following these steps means the client signs off on the brief before sourcing starts, every candidate is screened against the same criteria, and all updates and decisions are saved in the ATS.

2. Scope

This SOP applies to full-time and part-time remote roles we recruit for clients, from the intake call up to the 30-day check-in. It does not cover employment contracts, payroll, or hiring for our own team.

3. Process overview

Stage	Timing	Output
1. Role review	Day 0	Approved Role Brief
2. Talent sourcing	Days 1–5	Job ad live and 30–60 candidates in the pipeline
3. Screening and shortlisting	By day 5	Shortlist of 3–5 candidates sent to the client
4. Assessment and interviews	Days 6–10	Client picks a finalist
5. Offer and hire	Days 10–15	Signed offer
6. Onboarding	Start date to day 30	30-day check-in done

Day 0 is the day the client approves the Role Brief. All timings are in business days.

4. Roles and responsibilities

Role	Responsibilities
Recruiter	Owns the role from start to finish: intake call, job ad, sourcing, pre-screen calls, shortlist, reference checks and offer.
Recruitment coordinator	Books interviews, sends reminders and keeps candidate stages up to date in the ATS.
Hiring manager (client)	Approves the Role Brief, interviews candidates, sends feedback within 24 hours and makes the final hiring decision.
Account manager	Looks after the client relationship and contract, and handles any escalations.

5. Tools

Tool	What we use it for
ATS (Recruiterflow or Workable)	Job records, candidate profiles, stages, scorecards and interview feedback. Everything about a candidate lives here.
LinkedIn Recruiter and Sales Navigator	Searching for candidates and sending outreach messages
Job boards	Indeed, OnlineJobs.ph or Upwork, depending on the role
Google Workspace	Role Briefs in Docs, scheduling in Calendar, interviews in Meet
Canva	Job post graphics, using the brand template
Slack or email	Client updates and sending shortlists

6. Turnaround times

Task	Deadline
Book the intake call	Within 1 business day of the client's request
Publish the job ad	Within 1 business day of the brief being approved
Review new applications	Within 1 business day
Send the first shortlist	Within 5 business days of the brief being approved
Log interview feedback	Within 24 hours of each interview
Update candidates	Within 2 business days of any decision
Fill the role	10–15 business days

7. Procedure

7.1 Role review (Day 0)

1. Book a 30-minute intake call with the hiring manager within 1 business day of their request.
2. Fill in the Role Brief during the call. It should cover the job title and level, main responsibilities, must-have and nice-to-have skills, required software, salary range, working hours and time zone, interview stages, who makes the final decision, and the target start date.
3. Agree with the hiring manager on 4 or 5 criteria that every candidate will be scored on.
4. Email the Role Brief to the hiring manager for approval. Don't start sourcing until they approve it in writing.
5. Create the job in the ATS and attach the approved brief.

Output: approved Role Brief saved in the ATS.

7.2 Talent sourcing (Days 1–5)

1. Write the job ad using the Role Brief. Include a short intro about the client, the responsibilities, requirements, salary range and how to apply. Have someone else proofread it before it goes live.
2. Create the job post graphic in Canva from the brand template. Double-check the job title, salary and contact details against the brief.
3. Post the ad on the job boards agreed in the brief and note each one in the ATS.
4. Search for candidates in LinkedIn Recruiter or Sales Navigator and add good matches to the ATS with a source tag.
5. Send each sourced candidate a personalised message (Template 1). Follow up on day 3 and day 7. If there's still no reply after that, stop.
6. Check the pipeline every day. If there are fewer than 15 candidates by day 3, widen the search and let the hiring manager know.

Personalised outreach usually gets a 30–40% response rate. If it drops below 20%, rewrite the first line of the message or the way the role is pitched.

Output: at least 30 candidates in the Sourced or Applied stage.

7.3 Screening and shortlisting (by Day 5)

1. Go through new applications within 1 business day and tag each one Advance, Hold or Decline based on the must-haves.
2. Do a 20–30 minute video call with each candidate you advance. Ask about their experience, the software they use, availability and time zone, expected salary and notice period, and pay attention to their spoken English.
3. Score the candidate in the ATS right after the call and add your notes.
4. Pick the best 3 to 5 candidates. For each one, write a short summary covering why they fit, their expected salary, when they can start and any concerns.
5. Go through the checklist in Section 8, then send the shortlist to the hiring manager (Template 2) and share the profiles from the ATS.
6. If the hiring manager hasn't replied after 48 hours, follow up.

Output: the hiring manager confirms who they want to interview.

7.4 Assessment and interviews (Days 6–10)

1. If the brief includes a skills test, send it to the candidate with a 48 to 72 hour deadline.
2. Schedule interviews in the client's time zone. Put the meeting link, interviewer names, length of the interview, and the time in both time zones in every invite.
3. Send a reminder to both the candidate and the interviewer the day before.
4. Get written feedback from each interviewer within 24 hours and add it to the ATS.
5. Update every candidate within 2 business days after each decision. Use Template 3 for anyone who isn't moving forward.

Output: the client picks a finalist.

7.5 Offer and hire (Days 10–15)

1. Confirm the offer details with the hiring manager: salary, start date, working hours and probation period.
2. Do two reference checks, with at least one from a former direct manager.
3. Call the candidate to make the offer, then send the client's written offer within 1 business day.
4. Answer any questions or counteroffers and record the result in the ATS.
5. Once the offer is signed, let the other finalists know personally before closing their profiles.

Output: signed offer saved in the ATS.

7.6 Onboarding (start date to Day 30)

1. Send the new hire the onboarding checklist with the documents, accounts, equipment and first-week schedule.
2. Ask the client to set up the new hire's system access at least 3 business days before they start.
3. Check in with the new hire on their first day and at the end of week 1, and with the hiring manager on day 30.
4. Close the job in the ATS, archive the Role Brief and record the time to fill.

Output: 30-day check-in logged.

8. Shortlist checklist

Check every candidate against this list before sending a shortlist.

- ☐ Meets all the must-haves in the approved Role Brief
- ☐ Expected salary is within the approved range, or the difference is mentioned in the summary
- ☐ Availability, notice period and time zone confirmed on the call
- ☐ Scorecard and call notes filled in on the ATS
- ☐ CV is up to date and the candidate has agreed to it being shared
- ☐ Names, job titles and company names in the summary are spelled correctly

9. Message templates

Replace the text in [brackets] before sending.

Template 1: First message to a sourced candidate (LinkedIn)

Hi [First name],

I'm Kyla, a recruiter working with [type of client]. Your experience as [current role] at [company] caught my eye, and I think you could be a great fit for a remote [Role] position. [One line on what makes the role appealing.] The salary range is [range] per month.

Would you be open to a quick 15-minute call this week?

Template 2: Shortlist for the hiring manager (email)

Subject: [Role] shortlist – [number] candidates for your review

Hi [Hiring manager's name],

Here are [number] candidates for the [Role] position. I've pre-screened each of them against the brief we agreed on.

- [Candidate name] – [why they're a good fit]. Expected salary [amount], available from [date].

You can see their full profiles and scorecards here: [ATS link]. Could you let me know by [day] who you'd like to interview? I'll schedule them as soon as I hear back.

Template 3: Candidate not moving forward after an interview (email)

Subject: Your application for [Role]

Hi [First name],

Thank you for taking the time to interview for the [Role] position. After careful consideration, the team has decided to move forward with another candidate whose experience more closely matches what they need right now.

It was great speaking with you, and I'll keep your profile in mind for future roles that suit your background. I wish you all the best in your job search.

10. Reporting and KPIs

Send the client an update every Friday with their open roles, how many candidates are at each stage, the KPIs below, and anything that's slowing things down.

KPI	How to calculate it	Target
Time to shortlist	Days from brief approval to first shortlist	5 business days or less
Time to fill	Days from brief approval to signed offer	10–15 business days
Outreach response rate	Replies ÷ candidates messaged	30–40%
Shortlist to interview	Candidates interviewed ÷ candidates shortlisted	60% or more
Offer acceptance	Offers accepted ÷ offers made	85% or more

11. Candidate data

- Only store candidate information in the ATS. Don't keep CVs in personal folders, downloads or chat threads.
- Only share a candidate's CV with a client after the candidate says it's okay.
- Delete or anonymise records of candidates who weren't hired after 12 months, unless they've asked to stay in our talent pool.