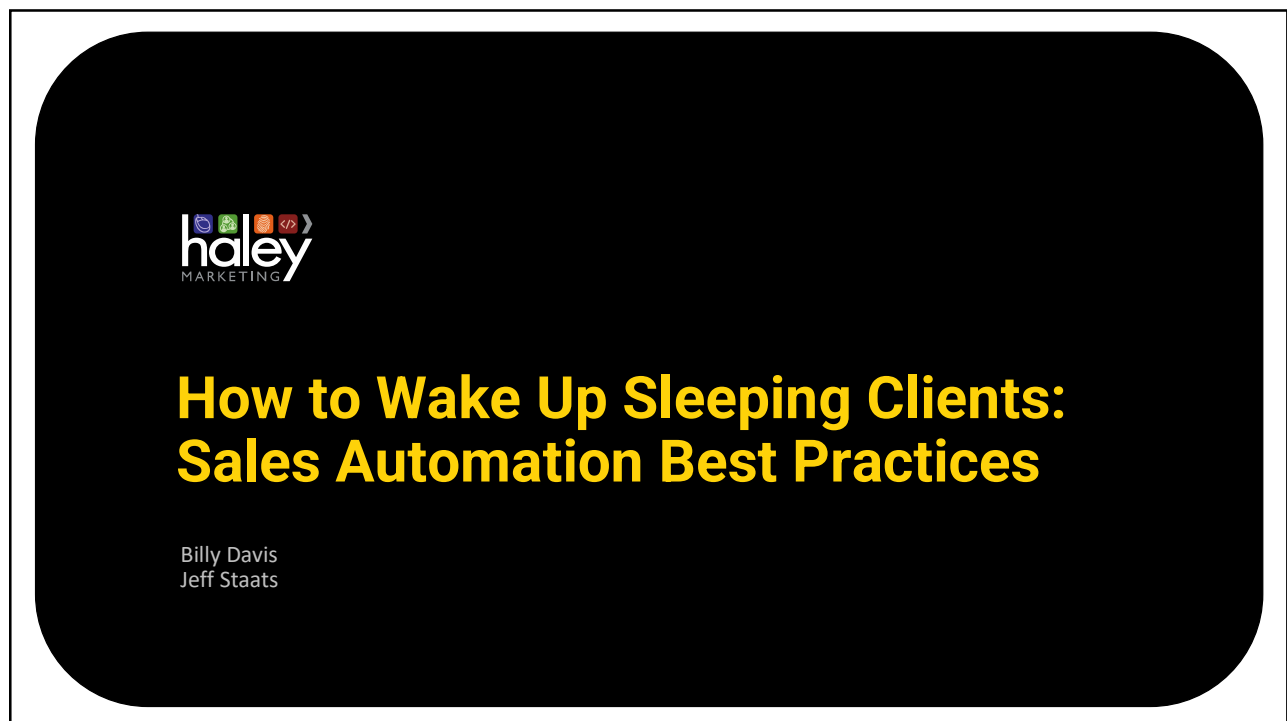




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SPEAKERS



3

Speaker: Billy Davis

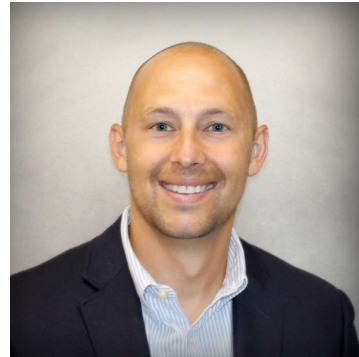
- Automating in Staffing since 2016
- First Full Time Herefish Employee
- Former: Director of Implementation, Support, and Success
- Current: Enterprise and Strategic Automation and AI Customer Success
- 300+ Implementations Completed
- 1000+ Companies Helped
- Automation and AI Thought Leader and Content Creator



4

Speaker: Jeff Staats

- CMO, Haley Marketing
- Automation Expert
- Clients focused on SMB and Midsized
- Platforms:
 - Bullhorn Automation
 - Sense
 - HubSpot
 - ActiveCampaign



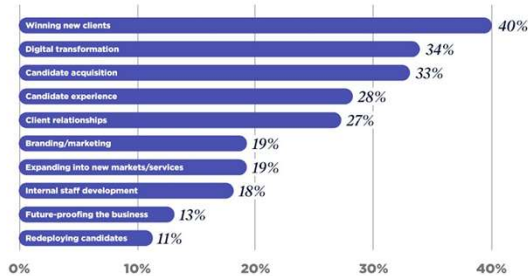
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Staffing Automation Trends



6

Top priorities for 2023



Winning new business is the top priority for businesses overall, with a few notable exceptions:

*Large enterprises, temp, and healthcare firms all cite **digital transformation** as their top priority instead.*

Source: GRID 2023 Recruitment Industry Trends Report

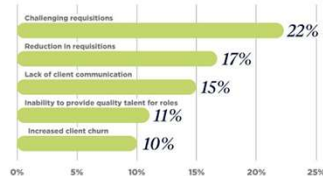


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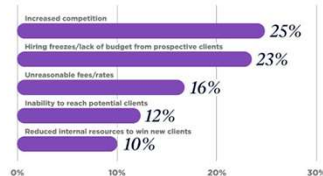
Top challenges to winning and maintaining business in 2023

Staffing professionals cite talent-related obstacles for existing clients and market-related challenges for new business

Top 5 obstacles for existing clients in 2023



Top 5 challenges for winning clients in 2023



Source: GRID 2023 Recruitment Industry Trends Report



8

Between Two Automation Guys



9

Why the Shift to Sales Automation?

Billy

- Tighter economic environment has shrunk job demand in a lot of business sectors.
- These macro environments are cyclical, though ... don't neglect candidate experience! When things flip back to a talent market, still ensure you are optimizing your client experience!

Jeff

- Automation has been focused on candidate side for over 5 years, that automation for sales was an afterthought...until now!
- Relearning of sales and sales process that is happening
- New remote work world to navigate...meetings, value-add, reach outs



10

What's Working in Sales Automation?

Billy

- Increased data quality
- Increased efficiency
- Using the Data

Jeff

- Expanding the sales force
 - Reach more prospects/clients without effort
 - 1:many approach
- Focus on better data



11

What Are the Pitfalls to Avoid?

Billy

- Don't over automate; mix in personalized touchpoints
- Be careful with text messages to clients
- Provide value before asking prospects
- Don't sound like everyone else, differentiate

Jeff

- Not getting buy-in from sales or leadership
- Less marketing, more human
- Make sure to weave in the relevance of the message, e.g., post-meeting, working together, seasonality
- Use the CRM properly
- Expecting automation to drive leads



12

Top Sales Automation Campaigns

Billy

1. Re-engage former clients to develop warm leads
2. Proactively market superstar candidates
3. Shorten and optimize submission and sales processes
4. Standardize client information candidates receive
5. Outbound to inbound prospecting transformation

Jeff

1. Passive client drip campaign (post-sales efforts)
2. Inactive client check-in
3. Welcome series to cold prospects (purchased lists or databases)
4. Re-engage clients with MSAs
5. Skill-based MPC emails



13

Sales Automation Best Practices

Billy

- Standardize your process and outreach
- Utilize NPS to measure satisfaction at key stages
- Leverage data (Example: candidate data as market analysis)

Jeff

- Use your CRM!
- Clean up and leverage your statuses
- Remember one touchpoint is usually not enough; stay in front
- Blend sales with automation
 - A, B, C leads
 - Prioritize follow-up
 - Create transition points



14

Where To Start?

Billy

- Back to front, closest to the dollar activities
- Rank and prioritize job orders and clients
- Map your sales cycle and process end to end
- Collaborate with sales team to identify quick wins and build momentum

Jeff

- Commit to your CRM
- Standardize fields like statuses, names, note types
 - Use a data dictionary
- Map your sales process
- Treat your statuses like a sales funnel
- Start with closest to revenue, work backward



15

For More Automation Information ...

*Check out bullhorn.com/connected-recruiting/
for more automation best practices!*

Weekday Staffing Automation Posts 11 AM EST on LinkedIn

<https://www.linkedin.com/in/buildwithbillydavis/>

Join 451 Automators in my Weekly Automation Newsletter

<https://buildwithbilly.substack.com/>



16



Questions?

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17

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2023 DIGITAL MARKETING BUNDLES

haley
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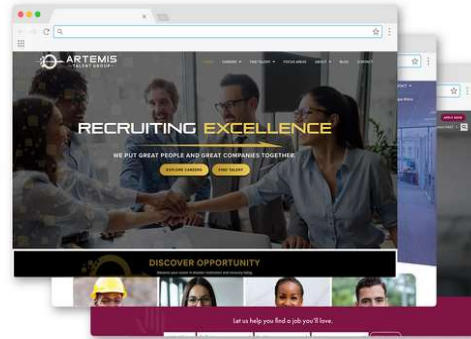





20

CRO Site Review

30-point review of your website



haleymarketing.com/websitereview



21

MMO

OUR NEXT WEBINARS



Nurture, Nurture, Nurture: How to Stay Top of Mind and Ahead of the Pack

Wednesday, June 21 at 3:00 PM ET

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22

Slide 22

MMO [@Jeffrey Staats] Updated the last slide. Please mention that the June LwH is not on our standard day or time.

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