

Strategic Business Proposal: Recruitment CRM Optimisation Assessment

Maximizing Recruiter Productivity and Pipeline Visibility through Strategic System Enhancements.

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Optimised CRM Processes Drive Recruiter Productivity and Pipeline Visibility

Converting CRM data into measurable recruiter productivity, faster placements and improved forecasting.



Underutilised Systems and Inconsistent Usage Cripple Recruitment Efficiency

Many recruitment agencies fail to realize the full value of their CRM investment due to inconsistent adoption, duplicate records and manual workarounds.



Underutilisation

Recruiters frequently revert to spreadsheets and manual trackers, leaving built-in CRM automation, reporting and pipeline tools underused.



Inconsistency

Different consultants follow different processes, creating inconsistent candidate experiences, fragmented data and unreliable reporting.



Duplication

Duplicate candidate and client records reduce search accuracy, create confusion and undermine trust in the CRM.



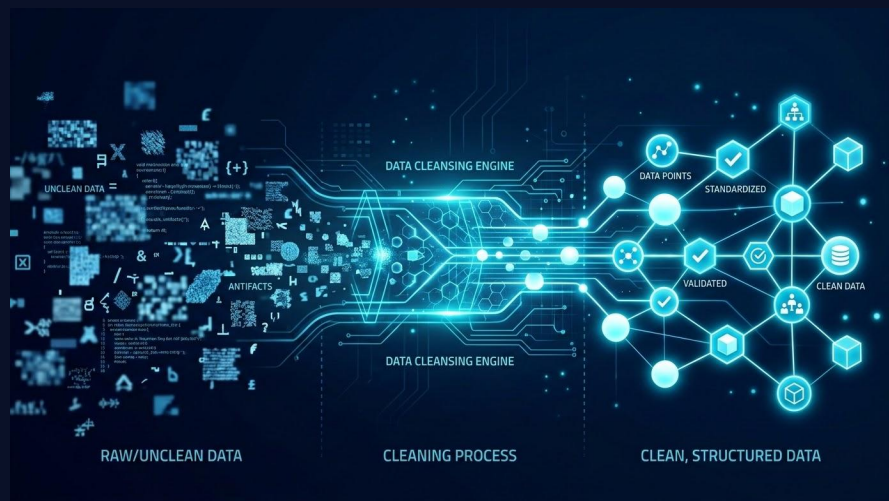
Manual Updates

Recruiters can potentially save 15+ hours per week through reduced manual data and administration instead of revenue-generating recruitment activity.

Business Impact: Reduced recruiter productivity • Poor forecasting • Lower CRM adoption • Slower placements

Poor Data Quality and CRM Decay Directly Impact Candidate Matching

High-performing recruitment teams rely on clean, searchable and continuously maintained candidate data.



CRM Decay

Candidate records become outdated within 6–12 months without active maintenance.



Process Friction

Poor search results force recruiters back to LinkedIn, job boards and spreadsheets.

Business Impact: Cleaner data improves search accuracy, recruiter productivity and candidate matching outcomes.

Poor CRM Visibility Limits Strategic Decision-Making

Without accurate real-time data, agency leaders struggle to forecast revenue, measure consultant performance and identify operational bottlenecks.



Fragmented CRM Workflows

Recruiters bypassing established workflows lead to severe pipeline visibility blind spots and inaccurate revenue forecasting.



Decision-Making Blind Spots

Leaders struggle to track time-to-hire metrics or measure individual consultant performance effectively without real-time data.



Inaccurate Forecasting

Inconsistent data entry and workflow adoption make revenue forecasting unreliable and difficult to trust.



Limited Performance Visibility

Leadership lacks real-time visibility into consultant activity, pipeline health and placement performance.

Mapping Recruitment Workflows Reveals Critical Operational Bottlenecks

The Recruitment Lifecycle

Understanding how candidates move through recruitment workflows is essential for identifying operational bottlenecks and productivity constraints.

Structural analysis highlights where delays frequently occur and where candidate drop-offs spike due to poor communication or slow feedback loops.

Recruitment Stage	Common Issue	Business Impact
Sourcing	Manual data entry	15+ recruiter hours lost per consultant per week on manual administration
Engagement	Slow follow-up	Loss of qualified candidates to competitors
Interviewing	Scheduling delays	Up to 30% increase in time-to-fill and delayed placement revenue
Placement	Manual updates	Inaccurate forecasting and missed revenue opportunities

Key Finding: Candidate engagement, interview coordination and CRM data management represent the highest-value opportunities to improve productivity, accelerate placements and increase revenue capacity.

Recommended Actions to Improve CRM Performance

The following initiatives address the highest-impact bottlenecks identified during the CRM assessment and deliver measurable operational improvements.



Automated Data Capture

Implement CV parsing and automated record creation to eliminate manual data entry and improve database accuracy.



Candidate Data Enrichment

Automatically maintain accurate candidate records through CRM integrations and profile enrichment.



Recruitment Workflow Automation

Automate outreach, follow-up and interview scheduling to reduce delays and improve candidate response rates.

Projected 90-Day Impact

- ✓ Save **15+ recruiter hours** per consultant per week
- ✓ Increase active workload capacity by **25-40%**
- ✓ Improve CRM data accuracy by **20-40%**
- ✓ Reduce candidate response times to **under 24 hours**
- ✓ Create capacity for **additional placements** without increasing headcount

Real-World CRM Improvement Outcomes

Anonymised results from recent recruitment agency assessments demonstrate the immediate impact of CRM optimisation on productivity and data integrity.

Reduced Manual Admin

40%

Reduction in time spent on data entry and CV formatting

CRM Adoption

90-100%

Standardised workflows led to 100% consultant engagement with system fields

Response Times

<24h

Automated engagement sequences ensure no candidate is left without feedback

Forecasting

Real-Time

Eliminated blind spots with live dashboards showing accurate revenue pipelines

90-Day Strategic Plan for CRM Transformation

Phased Implementation Roadmap

A phased implementation approach delivers quick wins early while building the foundations for long-term CRM performance and consultant productivity.

Why This Approach Works

- ✓ Delivers quick wins without disrupting recruiters
- ✓ Builds adoption before scaling automation
- ✓ Improves data quality before introducing complexity
- ✓ Creates a foundation for future growth



Days 1-30: Data Cleanup and Audit

- Audit CRM usage, workflows and data quality.
- Remove duplicate records and establish data standards.
- Identify highest-impact productivity bottlenecks.



Days 31-60: Process Automation

- Automate candidate engagement and follow-up workflows.
- Implement CV parsing and data enrichment processes.
- Reduce manual administration and recruiter workload.



Days 61-90: Reporting and Adoption

- Launch real-time leadership dashboards.
- Train consultants on standardized workflows.
- Measure productivity improvements and identify next-phase opportunities.

Start with a CRM Optimisation Assessment

Gain a clear understanding of where CRM inefficiencies are limiting recruiter productivity, candidate engagement and reporting visibility.

CRM Architecture Review

Review system structure to ensure it supports modern recruitment automation.

Workflow Observation

Identify friction points in live recruiter processes and document bottlenecks.

Data Quality Audit

Pinpoint data quality issues and create a prioritized list of actionable recommendations.

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