

Recruitment agency automation readiness checklist.

Recruitment Agency Automation Checklist

Tick each statement that reflects your current operations. More unchecked items indicate a stronger case for workflow improvement.

PROCESS

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- ☐ Core workflows are documented
- ☐ Ownership is clear at every stage
- ☐ Exceptions are visible

CRM & DATA

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- ☐ Required fields are consistent
- ☐ Duplicate records are controlled
- ☐ Notes are captured reliably

AUTOMATION

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- ☐ Scheduling is integrated
- ☐ Follow-up is triggered
- ☐ Routine updates are automated

MEASUREMENT

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- ☐ Capacity is measured
- ☐ Pipeline reporting is live
- ☐ Outcomes are compared to baseline

0-4 checked: urgent review • 5-8: targeted improvements • 9-12: optimise and scale