Sequence Template Examples

Advanced Sequencing · https://learnpcr.pcrecruiter.net/site/docs/advanced-sequencing/sequence-template-examples/

The Advanced Sequencing feature is an extremely powerful tool that assists you with creating a workflow that automates tasks, keeps track of follow-ups, and allows for a more hands off approach to your daily routine. Below are a few examples of different Sequencing Templates that can assist you with getting started. Once the configuration for the Sequence Templates is completed it is very easy to make small adjustments or additional Sequences in the future, these are just a starting point or examples for you to get a handle on how Sequencing works within the software. Each example comes with the instructions for setting up the Sequence and a visual flowchart to assist with better understanding how the backend and workflow for these examples functions. If you need additional assistance with setting up your Sequence please reach out to the support team.

Business Development Template

Our Business Development Template should be pre-loaded into your database prior to starting your Sequencing Training. If you have a database that was created before 2024 you may not see these in your database. If you would like these templates added to your database please reach out to the support team.

Instructions

This template is a very simple 3 step workflow for the user to connect with the contact. As soon as a connection has been made the record will be removed from the Sequence.

Overview of Steps:

Step 1 - Email:

Subject: Elevate Your Team with Top Talent - Let's Connect

Dear [[Name.First_Name]],

I hope this email finds you well. I recently came across several openings at your organization, and I couldn't help but think about how we could contribute to building your A-Team. Our firm specializes in identifying and attracting top-tier talent from various industries, helping you create a world-class team that can drive your company's success.

Currently, I have an exceptional candidate in mind who, under normal circumstances, might not be actively seeking new opportunities. However, due to some recent job dissatisfaction, they are now open to exploring new horizons. This individual brings a wealth of experience, expertise, and a track record of success that could significantly benefit your organization.

If you're interested in learning more about this candidate or exploring how our firm can assist you in securing top talent, I would be delighted to discuss this further. Please feel free to respond to this email or give me a call at [[System.User_Contact_Phone]]. I believe that our combined efforts can help you find the ideal addition to your team.

Thank you for your time, and I look forward to the possibility of working together.

Best regards,

[[System.Current_User_Email_Signature]]

Step 2 - Voicemail (if no response to initial email in 72 hours)

Instructions:

Follow up phone call to [[Name.First_Name]] [[Name.Last_Name]] at [[Company.Company_Name]] regarding the "Elevate Your Team with Top Talent" email they did not respond to sent 3 days ago.

Script:

Hello [[Name.First_Name]],

I hope you're doing well. I wanted to follow up on the email I sent a few days ago regarding the potential candidate and how our firm can assist in building your A-Team. I understand that you might be quite busy, and emails can sometimes get buried in your inbox, so I thought a quick call might be more effective to discuss this opportunity.

The candidate I mentioned has a unique blend of skills and experience that could make a significant impact on your team. I'd love to provide you with more details and explore how we can collaborate to make this happen.

Looking forward to speaking with you and exploring this further. I can be reached at [[System.User_Contact_Phone]] or you can email me at [[System.Current_User_Email]].

Thank you for your time.

Best regards,

[[System.User_Full_Name]]

Step 3 - Email:

Subject: Don't Miss Out on Top Talent - Let's Explore More Opportunities

Dear [[Name.First_Name]],

I hope this email finds you well. I wanted to provide you with an update regarding the candidate I mentioned in my previous messages. Unfortunately, the rapid pace of our industry led to a quick decision on their part, and they have now accepted another opportunity.

As you know, the talent market is incredibly dynamic, and the best candidates are often in high demand. However, this situation has highlighted the importance of staying ahead in the race for top talent. It's a testament to the caliber of candidates we can offer, and I'm eager to help you secure exceptional talent for your team.

The good news is that we have a robust talent pool of remarkable individuals who could be a perfect fit for your organization. I'd love the opportunity to discuss these candidates with you and explore how we can collaborate to meet your talent acquisition needs.

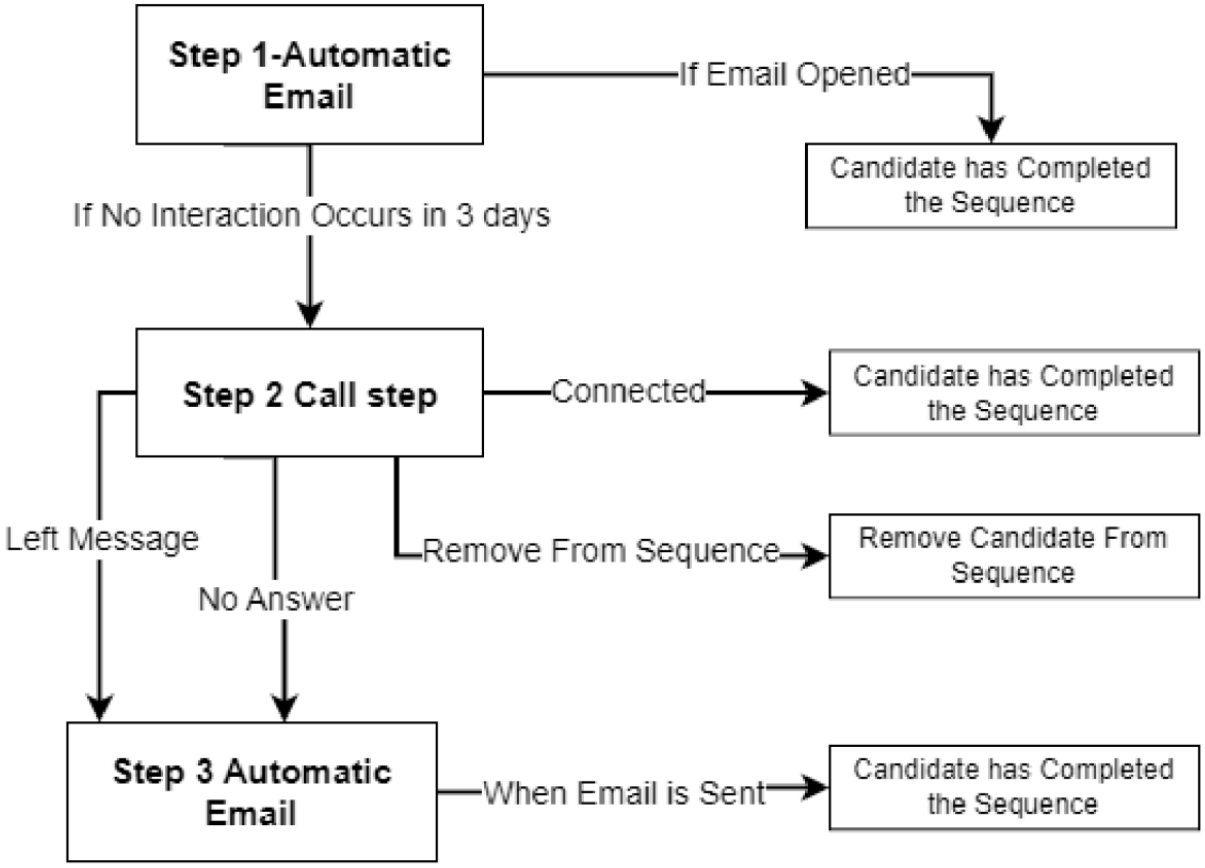
If you're interested in exploring other top-notch candidates or have any specific requirements in mind, please let me know, and we can set up a time for a conversation. Your input is essential, and I'm here to assist you in finding the best talent to drive your team's success.

Thank you for considering our services, and I look forward to the possibility of working together to enhance your team's capabilities.

Best regards,

[[System.Current_User_Email_Signature]]

Breakdown of Steps



1. In this step the user is attempting to contact this potential client in order to inquire about any potential openings while ensuring to inform them of your pool of qualified candidates. If they reply to the email (Contact made) then the client will be removed from the Sequence but remain on the Rollup list. You are then able to continue to communicate with them directly outside of the Sequence or add them to another Rollup with a different process.

2. After 3 days of no response from the client you will be prompted to call them and follow up on your email. In this step you will mark this interaction in the task depending on the outcome of the call. If you connect with them and they express interest you will mark this as connected and continue your communication with them outside of this Sequence, they will remain on the Rollup with this selection. If they do not wish to be contacted or are the incorrect POC you will mark this as Remove From Sequence to take them out of the Sequence and off of the Rollup list. From here you can either move onto a new client or search for a different point of contact at the company.
3. The final step of the Sequence is another automatic email following up on your first email and call. If you left them a voicemail or they did not answer this email will be sent 2 days after your previous call. After the email is sent the contact will be removed from the Sequence but remain on the Rollup list for reference if they respond in the future or if you wish to utilize the same Rollup in the future to check in again. This allows you to keep your Sequence Task list clean and prioritize those clients that you are actively communicating with.

Candidate Engagement Template

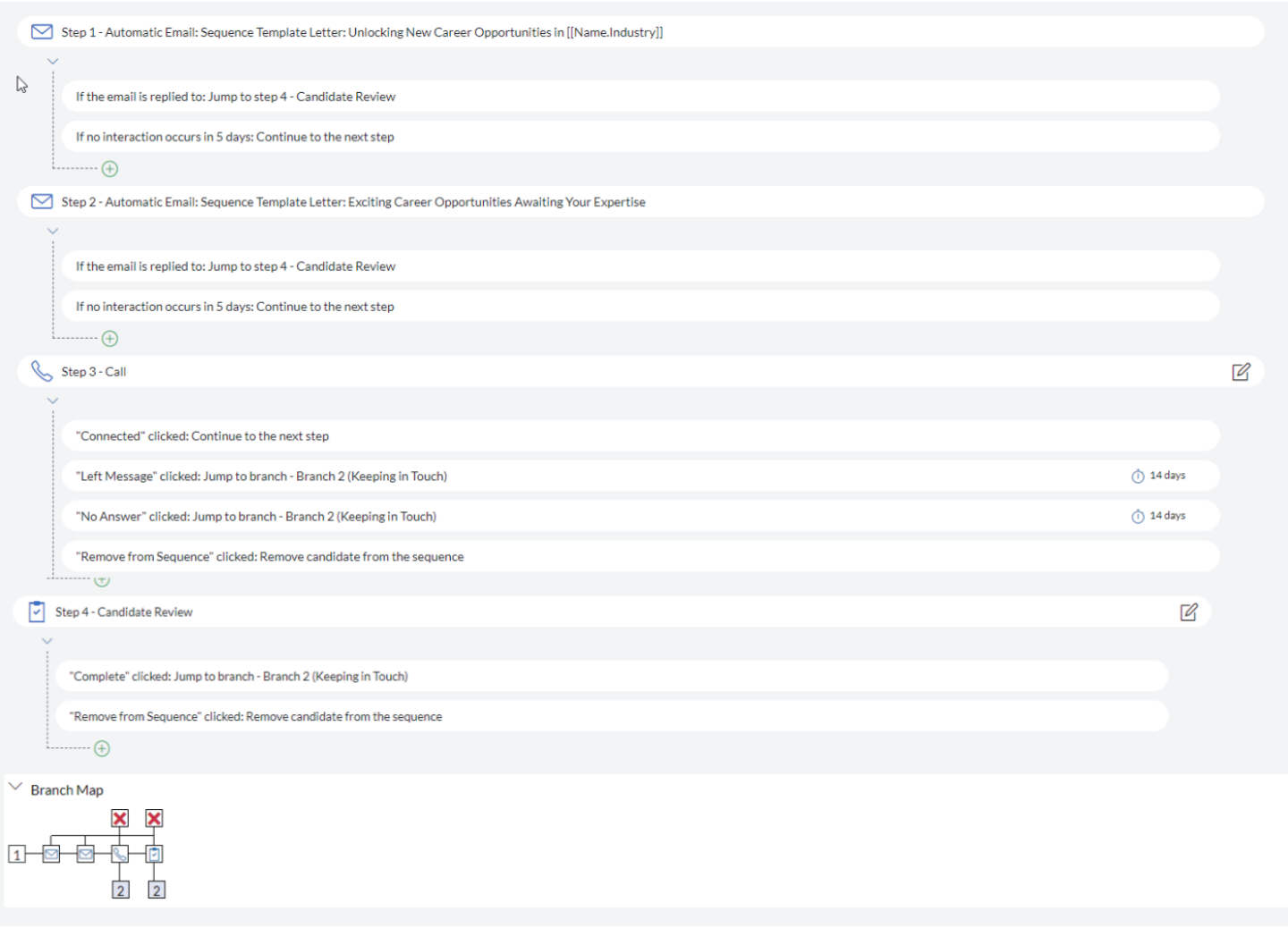
Our Candidate Engagement Template should be pre-loaded into your database prior to starting your Sequencing Training. If you have a database that was created before 2024 you may not see these in your database. If you would like these templates added to your database please reach out to the support team.

Instructions

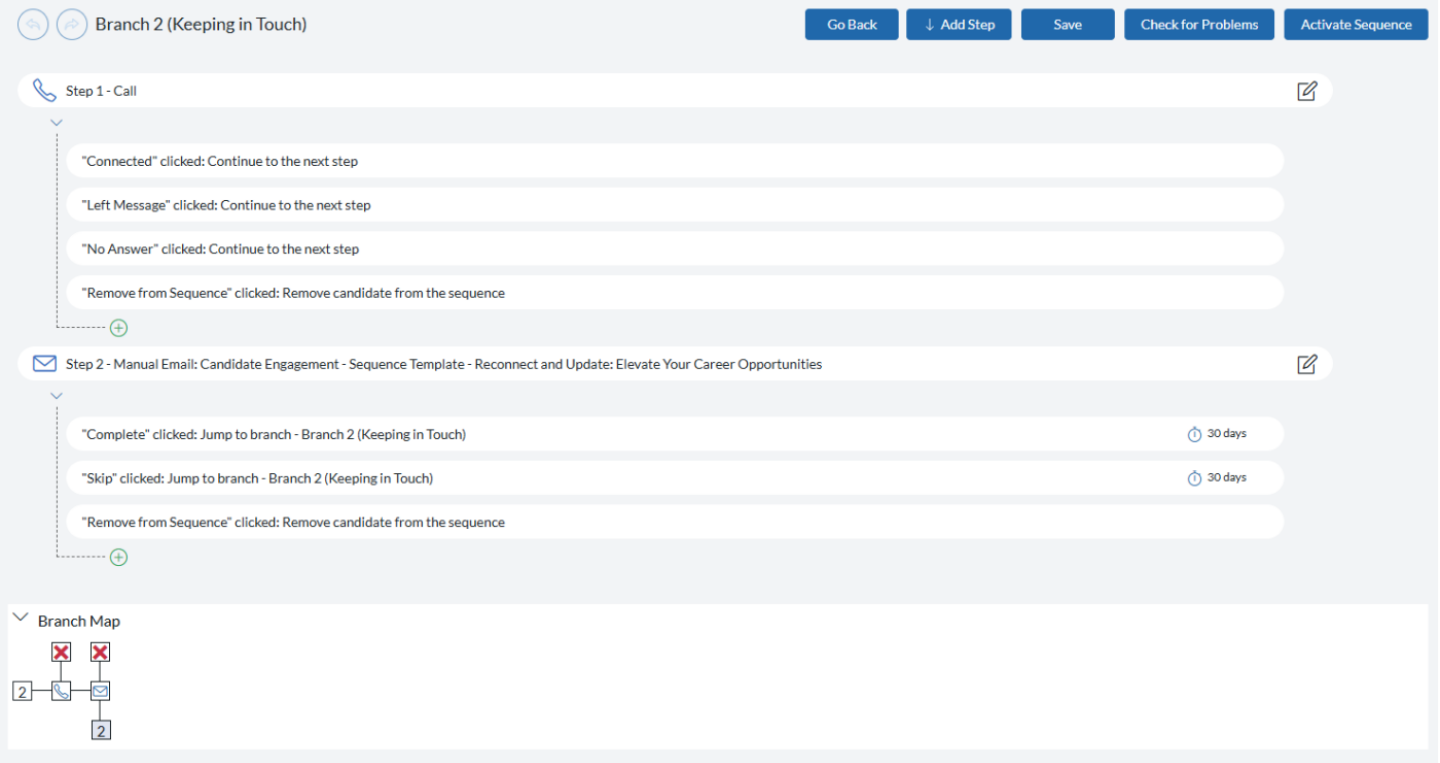
This template is a 2 branch Sequence with a continuous workflow for the user to connect with and then remain in touch with the contact. The initial contact is for a check in followed by another contact attempt every 30 days to maintain a relationship with and attempt to offer current roles to the candidate. This may also help you to determine if the candidate is happy in their current role or open to new opportunities. Names in branch 2 will remain there, cycling between steps 1 and 2, until they are manually removed from the Sequence.

Overview of Steps:

Branch 1


Step 1 - Automatic Email: Sequence Template Letter: Unlocking New Career Opportunities in [[Name.Industry]]
If the email is replied to: Jump to step 4 - Candidate Review
If no interaction occurs in 5 days: Continue to the next step
Step 2 - Automatic Email: Sequence Template Letter: Exciting Career Opportunities Awaiting Your Expertise
If the email is replied to: Jump to step 4 - Candidate Review
If no interaction occurs in 5 days: Continue to the next step
Step 3 - Call
"Connected" clicked: Continue to the next step
"Left Message" clicked: Jump to branch - Branch 2 (Keeping in Touch)
14 days
"No Answer" clicked: Jump to branch - Branch 2 (Keeping in Touch)
14 days
"Remove from Sequence" clicked: Remove candidate from the sequence
Step 4 - Candidate Review
"Complete" clicked: Jump to branch - Branch 2 (Keeping in Touch)
"Remove from Sequence" clicked: Remove candidate from the sequence
Branch Map
1
2
2

Branch 2



Step 1 - Automatic Email:

Subject: Unlocking New Career Opportunities in [[Name.Industry]]

Hi [[Name.First_Name]],

I hope this message finds you well. My name is [[System.User_Full_Name]], and I specialize in connecting top talent like yourself with exciting opportunities in the [[Name.Industry]] sector. Your experience caught my eye, and I believe your background could be a perfect match for several of our clients who are leading the way in [[Name.Specialty]].

I'd love to have a brief chat about your career aspirations and how I can help you find your next challenge. Are you available for a quick call this week or next? Please let me know a time that works for you, and I'll make the arrangements.

Looking forward to connecting and learning more about your career goals.

Best regards,

[[System.User_Full_Name]]

[[System.Current_User_Email_Signature]]

Step 2 - Automatic Follow-Up Email (if no response to initial email in 5 days):

Subject: Re: Exciting Career Opportunities Awaiting Your Expertise

Hi [[Name.First_Name]],

Just following up on my previous email regarding potential career opportunities in [[Name.Industry]]. I understand you're likely busy, but I wouldn't want you to miss out on some of the exclusive roles we're currently sourcing for.

If you're open to exploring new challenges, I'd be keen to discuss your career objectives and how we can support you in achieving them. Could you please let me know a convenient time for a brief call? Your next big opportunity might just be a conversation away.

Thank you for considering this, and I hope to hear from you soon.

Best,

[[System.User_Full_Name]]

[[System.Current_User_Email_Signature]]

Step 3 - Call (if no response to Follow-Up email in 5 days)

Instructions:

Follow up phone call to [[Name.First_Name]] [[Name.Last_Name]] at [[Company.Company_Name]] regarding the Candidate Engagement email they did not respond to sent 3 days ago.

Script:

Introduction:

"Hi [[Name.First_Name]], this is [[System.User_Full_Name]]. I recently reached out via email about some exciting opportunities in your field. Do you have a moment to talk?"

If Yes:

"Fantastic! I work with various leading companies in [[Name.Industry]], and based on your skills in [[Name.Specialty]], I believe there are several potential fits for you. I'd love to understand more about what you're looking for in your next role and discuss how we can help you achieve your career goals. What's important to you in your next position?"

During the Call:

Explore the candidate's career aspirations, preferred company culture, and other preferences.

Briefly describe the types of companies and roles that align with their skills and interests.

Discuss the process moving forward, including how you'll represent them and what they can expect.

Closing:

"Thank you for sharing your insights and preferences, [[Name.First_Name]]. I'm excited about the potential to help you find your next great opportunity. I'll follow up with a summary of our discussion and next steps. In the meantime, please feel free to reach out with any questions or updates on your end."

Voicemail Script:

"Hello [[Name.First_Name]], this is [[System.User_Full_Name]], reaching out again following my recent email about exciting opportunities in the [[Name.Industry]]. I specialize in connecting talented professionals like yourself, with a focus on [[Name.Specialty]], to leading companies. I'm eager to learn about your career goals and discuss how we can find the perfect fit for you. Could you share what you're looking for in your next role? Let's explore how we can align your aspirations with the right opportunities. I'm looking forward to potentially working together to advance your career. Please give me a call back at your earliest convenience to discuss further. Thank you, [[Name.First_Name]], and I hope to hear from you soon."

Step 4 - Candidate Review

Instructions:

[[Name.First_Name]] [[Name.Last_Name]] has either replied to an email in your Candidate

Engagement Sequence or they have been moved there after you connected with them on the phone.

Their information should be reviewed and updated as needed. Completing this step will move the candidate to the "Keeping in Touch" branch for review in 30 days.

Branch 2 - Step 1: Keeping in Touch (Phone)

Instructions:

It has been 30 days since you reviewed [[Name.First_Name]] [[Name.Last_Name]]. Please reach out to get updated information and check in.

Script for Voicemail or Live Call:

"Hi [[Name.First_Name]], it's [[System.User_Full_Name]] from (Your Company Name). I'm reaching out to touch base and see how things are going on your end. We have some new roles that align with your expertise and career goals. Even if you're not actively looking right now, I thought it would be great to catch up and keep you updated on the market. You can reach me at [[System.User_Contact_Phone]], or let me know a good time to call you back. Looking forward to our chat!"

Branch 2 - Step 2: Keeping in Touch (Manual Email)

Instructions:

This is an email used to gather the most up to date information from [[Name.First_Name]] [[Name.Last_Name]].

Subject: Reconnect and Update: Elevate Your Career Opportunities

Hi [[Name.First_Name]],

I hope this message finds you well and thriving. It's been some time since we last connected, and I wanted to reach out personally to catch up.

I’m committed to helping talented professionals like yourself find opportunities that match your skills, ambitions, and career goals. To ensure we can best represent and support you, we're currently updating our records and would love to get the most current information about your professional journey.

Could you please share any recent updates to your resume or LinkedIn profile with us? Specifically, we're interested in:

- Any new roles or projects you've undertaken since we last spoke

- Changes in your job preferences or career objectives

- Additional skills or certifications you've acquired

- Your current availability and interest level in exploring new opportunities

Your updated information will help us tailor our search to find the perfect fit for your next career move. Feel free to provide your updated resume at this link: [[Update Resume]] or share any new details or contact information at this link: [[Profile.Candidate Update Form]].

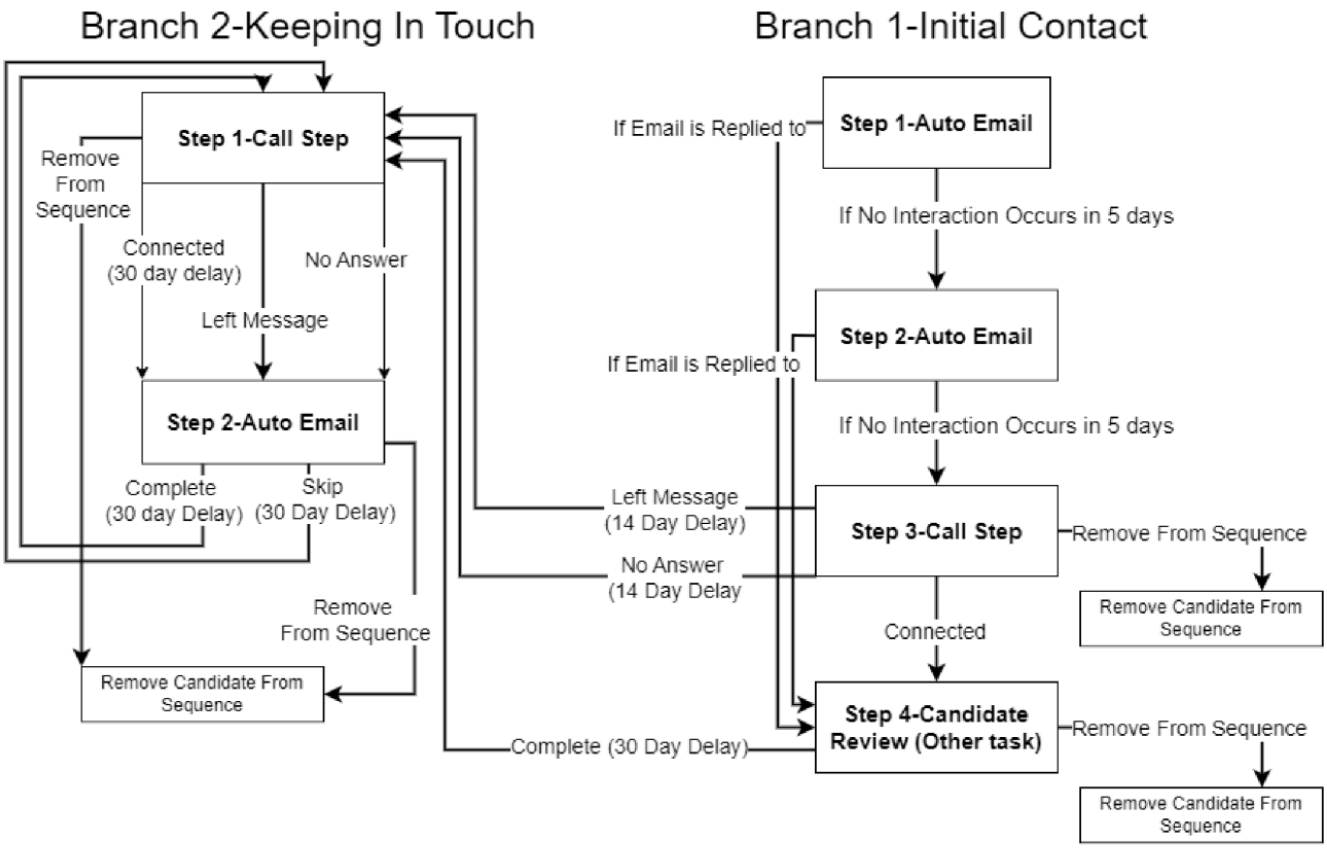
Also, if there's anything specific you're looking for in your next role or any particular companies you're interested in, please let me know. Your insight is invaluable in helping us serve you better.

Thank you for taking the time to update your information. I'm looking forward to hearing from you and assisting you in your career journey. Please don't hesitate to reach out if you have any questions or need further assistance.

Warm regards,

[[System.Current_User_Email_Signature]]

Breakdown of Steps



Branch 1:

1. In this step the user is attempting to contact this potential candidate in order to inform them of any potential openings you are currently recruiting for. If they reply to the email then the candidate will jump to the Review Response manual task to determine their interest in a new role. From here you can determine if they should remain in the Sequence or be removed from future contact.
2. After 5 days of no response from the candidate a second email will be sent out following up on your first email. If they reply to the email then the candidate will jump to the Review Response manual task to determine their interest in a new role. From here you can determine if they should remain in the Sequence or be removed from future contact.
3. After 5 days of no response from the candidate you will be prompted to call them and follow up on your emails. In this step you will mark this interaction in the task depending on the outcome of the call. If you connect with them and they express interest in a current role you will mark this as connected and then move them to the next step to determine where they should go from here. If

they do not wish to be contacted in the future you will mark this as remove from Sequence to take them out of the Sequence and off of the Rollup list. If you leave them a voicemail or they do not answer they will be moved to the keeping in touch branch so that you can reach out to them again in 14 days.

4. The final step of this branch is the Review Response step, which allows you to review the email response or call you had with the candidate. If they are interested in a role you are currently recruiting for you can link them to the Pipeline for that position and remove them from the Sequence to continue communication outside of the Sequence. If they are not currently interested but may be looking for another role in the future or you want to ensure that you maintain a relationship with them you will mark this task as complete which will move them to Branch 2.

Branch 2:

This is a cyclical or continuous branch, meaning until the candidate is manually removed they will continue to cycle between step 1 and 2 every 30 days. This ensures that you maintain regular contact with them without needing to remember when to reach out, they will simply pop up as a task 30 days after the previous outreach/connection.

1. After the candidate enters branch 2 you will be prompted to call them to check in on their interest. In this step you will mark this interaction in the task depending on the outcome of the call. If you connect with them and they express interest in a current role you can link them to the Pipeline of that Position and then remove them from the Sequence to continue to work with them directly from the Pipeline. If you connect with them and they are not interested right now but you wish to maintain contact with them you can mark complete to move them to the next step. If they do not wish to be contacted in the future you will mark this as remove from Sequence to take them out of the Sequence and off of the Rollup list. If you leave them a voicemail or they do not answer these options will move them to the next task.
2. The second task in the Sequence is a manual email task. After a connected call you will be prompted to send this email 30 days later. If you left a voicemail or they did not answer the Manual email task will show on your task list immediately. After sending the email click complete and the Candidate will repeat the cycle, showing up as a call task 30 days later.