

GUIDE

# The ultimate guide to **proactive sourcing**

The strategies you can adopt to pro-actively talent pool crucial skills to beat your competition in the race for talent.

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In our previous guide, **measuring the success of passive attraction**, we started to look at how you can weather the impact of uncertain economic times by expanding your attraction strategy beyond a vacancy-led, reactive approach.

In this guide we will take a deeper dive into how you can translate this into a truly proactive talent strategy.

Understandably, we are seeing individuals prioritising financial security in their approach to work, making it increasingly challenging to entice top tier talent to move to new employers.

So if it's becoming increasingly hard to fill your crucial roles using traditional sourcing methods, you might need to adopt a more proactive approach.

When we enter a more buoyant hiring market, these strategies will ensure you're ready to seize opportunities when your organisation is prepared to accelerate growth.

You'll gain a competitive edge by pro-actively engaging and nurturing the talent you need before you have the live vacancies to fill.



## Measuring success in passive attraction

Scan the QR code to access this guide.

# Understanding proactive sourcing

## What is proactive sourcing?

Proactive sourcing involves taking a proactive approach to talent acquisition by actively searching for and engaging with potential candidates before a job vacancy arises.

This is a skills-led approach, and it is not led by vacancies.

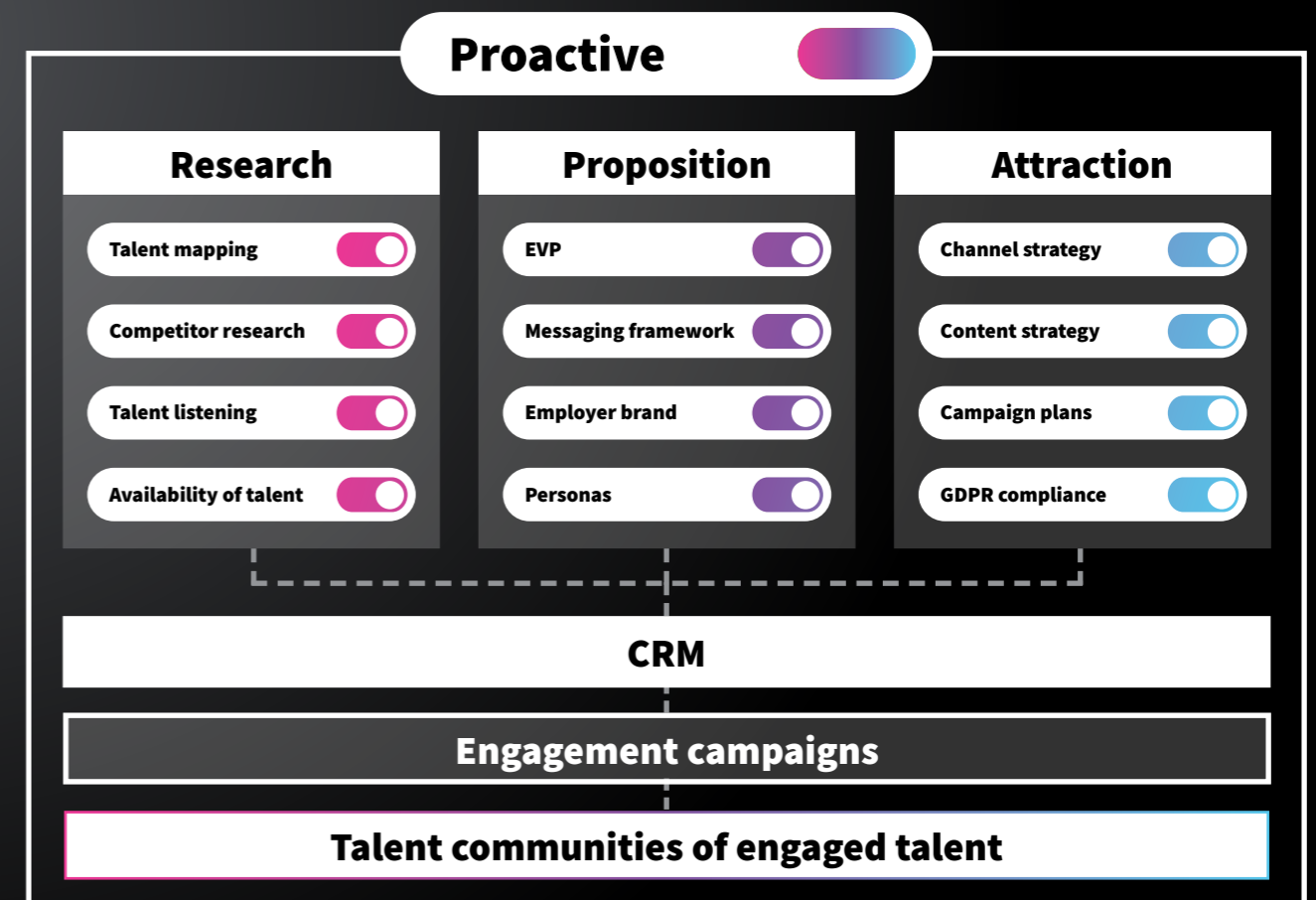
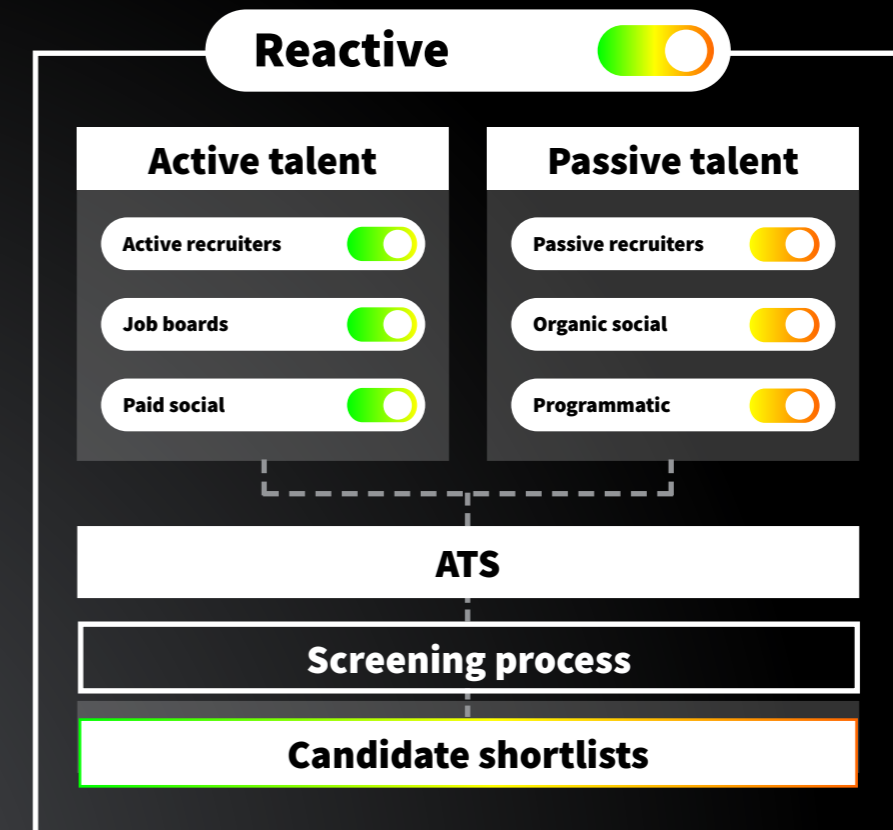
It's about positioning your organisation at the epicentre of a specific community of talent.

It helps you to create a competitive advantage for your TA team when approaching the roles that you struggle to hire using a reactive approach.

*The diagrams on the opposite page show the different sourcing approaches you can adopt in TA.*

**Reactive sourcing** involves switching on various channels to attract active and passive talent applications. These are stored in your ATS, and after they've been through a screening process, they are fed into candidate shortlists.

**Proactive sourcing** is research-led, using your teams to map the external market, and look at the skills you have internally - as well as the ones you can train. This data is hosted in a CRM which fuels engagement campaigns. The objective of proactive sourcing is to create talent communities of engaged talent.



## When is a proactive sourcing strategy the right strategy?

Proactive sourcing is a patient job, and it's not the right approach for every skillset that your organisation needs to hire. It should only be used on roles that are critical to the future of your organisation, that you struggle to hire using reactive sourcing methods.

### How do you know if a role is critical to your organisation's future?

- Your organisation can't deliver on its strategy without it
- Your organisation requires this skill in volume
- Your organisation currently finds it very difficult to recruit this skill via traditional methods – for example, you have to use a lot of agencies, or your time to hire is very slow.

This is probably only about 10% of the roles that you currently hire.

Talent acquisition needs to work with business leadership to identify the skills that are going to make the maximum impact on the business – and this should form the backbone of your proactive sourcing strategy.

**10%**

**You should only try to pro-actively source for 10% of your roles.**

*Proactive sourcing cannot be carried out by your vacancy fulfilment team because you measure the success of these jobs differently.*

#### Vacancy fulfilment KPIs

- Number of roles filled
- Time-to-hire
- Shortlist to interview rate
- Interview to offer rate

#### Proactive sourcing KPIs

- Talent pool size
- Talent pool engagement
- Number of hires made from talent pools

## Who owns proactive sourcing?

TA is about making sure the right person gets the right job, and that goes for your own team as well.

We believe that your recruiters shouldn't be the ones handling proactive recruitment. They're absolute pros when it comes to vacancy-led recruitment, and that's where their focus should be.

Proactive sourcing and engagement are different skillsets with their own set of metrics and KPIs to measure success.

To effectively build a proactive sourcing strategy, hire the right experts in engagement, content creation, CRM management and effective EVP messaging campaigns.

# The elements of your proactive sourcing strategy

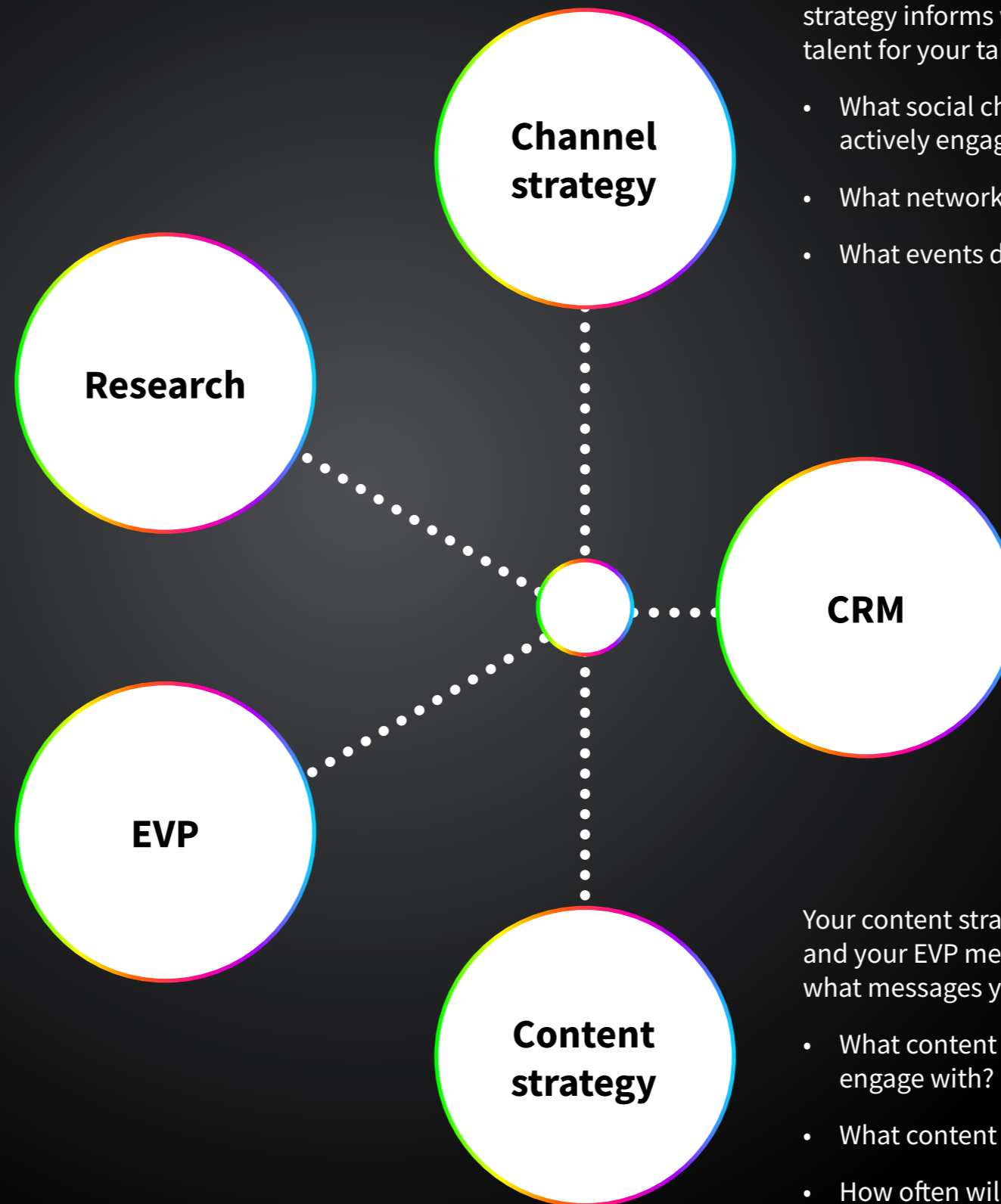
Your proactive sourcing strategy has to start with research. The first step is understanding the skillsets that are going to be critical for the future success of your business.

Then you need to understand the talent pools that you need to target.

- What are the current market trends?
- What personas make up your talent pools?
- What motivates these talent pools?

Your EVP forms the foundation for all of the talent-focused messaging in your organisation.

It is designed to help you articulate what you offer as an employer and should be your guiding star for the content plans and engagement campaigns you design in your proactive sourcing strategy.



Your research will inform your channel strategy. This strategy informs where you're going to try and attract talent for your talent pools.

- What social channels are your ideal candidates actively engaged with?
- What networks are they in?
- What events do they attend?

Your CRM is the system you will use to process talent pool contacts and engage with them.

- Do you have the right system?
- Is it configured correctly?
- Does it integrate with your other TA systems?
- How GDPR compliant is it?

Your content strategy will be informed by your research and your EVP messaging framework. It should articulate what messages you intend to activate on your channels.

- What content does your target audience want to engage with?
- What content will help you tell your EVP story?
- How often will you push out content?



# How to engage the talent pools in your CRM

Here's how we approach the creation of CRM engagement campaigns.

## Set your objective and goals

### Define your project objective

Your objective will help to align your proactive sourcing team to the same direction, ensuring everyone is moving towards the same thing.

It's useful to include your north-star metric - the one metric that will show success of this strategy.

### Define your project goals

A proactive sourcing strategy has to be a patient one, so it's important to define the milestones that you can hit on the way to achieving your project objective.

This will help you and your team to celebrate the wins you achieve along the way.

Ensure that your goals are measurable and that your systems will be able to produce the data you need to measure your future success, and help you to identify areas for improvement.

## Build personas

### Who are you looking to engage?

A persona refers to a representation of an ideal candidate. It is a profile that captures key attributes, behaviours, needs, and preferences of a specific target audience.

Personas serve as valuable reference points for crafting personalised communications and experiences, ensuring that interactions with talent pools are relevant, engaging, and ultimately lead to stronger relationships and increased customer satisfaction.

### What should a persona include?

- **Who:** What are their geographic, demographic and psychographic profiles?
- **Where:** Where do they look for roles? Where do they go for role related content?
- **What:** What do they want to hear? What do you want to tell them? What are their career ambitions?
- **When:** When is the best time to reach them? When will they be most receptive to your content?



#### Top Tip:

Engage your hiring managers to build your personas to get an insight into the personas you need, and get them bought in to the changes you'll propose to the sourcing process.



### Want to build your talent personas?

Read our how to guide.

*“ The only way to get value out of a proactive sourcing project is to take the time to really understand the personas you’re trying to engage. ”*

**Laura Blundell**

**Senior Digital Content Editor @ Caraffi**



Figure 4: The AIDA attraction model

**Create your content plan**

When designing your content plan for your talent pool engagement campaigns, we like to consider the AIDA model to help us ensure we're using our content to drive our audience through the funnel.

**We align our content plans to 3 main approaches:**

**Awareness & Interest**

This content is all about nurturing the relationship. It's what intrigues your audience and provokes them to want to know more about you.

Themes include:

- Brand awareness content about your vision, mission, values and EVP.
- Solve the challenges that this talent pool is currently facing in their role with tools, frameworks and templates.
- Help your talent pool achieve their career ambitions.
- Showcase your own employee stories that will resonate with this talent pool.
- Company news, insights and thought leadership - if these can be exclusive to this group then even better!
- Insights into your internal talent initiatives like diversity, wellbeing and internal mobility promotions.



## Create your content plan

### Desire and action

Once you have communicated who you are to your audience, you can start to move talent down the funnel into desire and ultimately action.

Themes include:

- Career opportunities
- Mentoring and career conversation calls
- Hiring manager spotlights
- Project spotlights that highlight the cool work that your teams are doing
- Referral and affiliate opportunities for your talent pool to bring talent from their networks into your campaigns
- Experiences for your talent pool to engage directly with your employee ambassadors

### Due diligence

Whilst this isn't the sexiest content you put out, it's also vitally important. These communications help you meet GDPR regulations, keep quality data and also ensure you're creating positive experiences with this network of talent.

Due diligence comms might include:

- Introductory and welcome comms
- Requests for further engagement
- Opt-out requests in keeping with your privacy policy

## Define your audience journey

### Align your content plans to your personas

Once you've created your content plan, you need to review it through the lens of your personas. Think about how can you tailor your content to feel as relevant to each of your talent personas as possible.

If your talent pool engagement content feels too generic or it feels irrelevant, it's likely that you'll see low open rates and high numbers of unsubscribers.

### Establish frequency of comms

When thinking about how often you plan to engage your talent pool understand that consistency is key. It's better to contact this pool once every two weeks on a consistent basis than to try and adopt a weekly schedule that your team struggles to maintain.

### Define your system triggers

If you're automating your engagement comms, its important to define the triggers in your process. For example:

- What enrolls a user into your campaign?
- What levels of engagement trigger an unsubscribe prompt?
- What levels of engagement trigger a contact to become an ambassador or partner in your programme?

## Measure and refine

How do you measure your proactive sourcing campaigns?  
We believe there are four main types of metric to consider:

### Talent pool sizes

How many candidates have you attracted into the talent pools you're building?

### Community engagement

These include things like engagement rates, click through rates, open rates, event registrations, meetings arranged, candidate profiles completed.

### Diversity of talent pools

What's the gender split of your talent pool? What's the ethnicity breakdown? Does this outperform the current market rate for this skillset? Do these talent pools reflect all the ambitions in your DE&I strategy?

### Hires made from talent pool

When you're building your talent pools you'd want to see 10% of the hires you make for this skillset to come from this talent pool. But as your engagement campaign gets up to speed you want this number to grow to around 50%.

# The benefits of proactive sourcing

## **Reducing time-to-hire:** enhancing efficiency in talent acquisition

Companies can significantly reduce the time required to fill future critical positions - when a vacancy arises recruiters can draw from a warm pool of qualified candidates who are already exposed to the brand - reducing the need for a lengthy and costly hiring process.

## **Reduced agency spend:** increasing direct sourcing

Agencies are most likely to be engaged when your future critical roles need filling, fast. Having an engaged talent community to source talent from will help you to curb costly agencies fees - especially if you're after niche talent.

## **Accessing high-quality candidates:** elevating your talent pool

Proactive sourcing allows recruiters to evaluate potential candidates before a position becomes available. This ensures that candidates are not only qualified on paper but also align with company values/culture etc. Therefore, your quality of hire will improve, leading to better performance and reduced churn.

## **Leveraging insights for competitive advantage**

**Beat your talent competitors:** identify and secure top talent before their competitors even begin their search. This is why being able to identify early on what critical skills you're going to need will really boost your proactive sourcing strategy!

**Data and insights:** Improve your knowledge of your candidate personas for critical talent and adjust your future strategies arms with competitor mapping, salary benchmarking, geographical talent availability and DE&I landscapes.

In conclusion, proactive sourcing could be an essential strategy for talent acquisition as long as it is approached in the right way, by the right people.

### **The right way**

This approach is not be suitable for every role. Different positions require different recruitment strategies.

You will need to work with business leaders to identify these future-critical roles - what skills are going to make the maximum impact on the future of your business?

### **The right people**

Get the experts involved. Having specialists who understand the unique demands of proactive sourcing and engagement ensures a successful and tailored approach.

As we in TA navigate the uncertain landscape ahead, implementing these strategies will be crucial in shaping a successful and sustainable future for businesses across industries.

# Want to create and activate a proactive sourcing strategy?

**Our team can help you build a strategy proactive sourcing capability for your organisation.**

Our expert teams can help you:

- Identify your future critical skillsets
- Get the insights that help you build an irresistible proposition and understand your competitor landscape
- Build out channel and content strategies to attract the talent you need and position you as a destination employer
- Activate your strategy with a team of sourcers, backed by our content and creative teams.

Book a talent advisory session with our team to get the ball rolling. It'll take 30 minutes and you can invite any relevant colleagues along too.

**Book advisory session**




# CARAFFI


## About Caraffi:

Caraffi is a talent acquisition advisory on a mission to make talent the engine room of every organisation. We want to change how talent, people and HR leaders see themselves and their ability to drive business performance.

So whether you're new in role or in the midst of a transformation, Caraffi will elevate your capability, impact and reputation within your business and beyond.

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