5 Playbooks To Attract More Candidates with Bullhorn Automation and Staffing Referrals

If your staffing firm uses Staffing Referrals and Bullhorn Automation, you are well ahead of the referral game. The integration between the two platforms further automates your communications so you can speed up your recruitment process, improve the quality of candidates that come across your desk, and nurture relationships with your talent.

In this PDF, you'll find 5 easy referral playbooks you can implement today in Bullhorn Automation. These playbooks will help you expand your ambassador network, get more candidate referrals, and convert more of those referrals into placements.

Let's go!

*These automations are suggested templates. Before using, please test them to ensure they fit with your recruitment process.

To use Staffing Referrals fields in Bullhorn Automation, you need to configure your Bullhorn Automation settings:

1 In Bullhorn Automation, go to Settings > Bullhorn

2 Click **Bullhorn Integration Settings**

3 Ensure the checkboxes next to these fields are checked:

- ☐ Ambassador
- ☐ Ambassador Dashboard URL
- ☐ Referred By

4 Click **Save**

1. Existing talent email campaigns

Goal: Keep your referral program top-of-mind for your talent and get more referrals from every communication

Playbook:

1 Locate your company's **Refer a Friend** page URL

▶ In Staffing Referrals, go to Settings > Developer Settings > Website Widgets

2 Add this link to the footer of all existing talent email campaigns *(e.g., job notifications, re-engagement)*

▶ Example language: "Refer & Earn $500," "Earn $500 by referring a friend to work with us."

Jane Smith
Recruiter | Staffing Agency

Call | Email | Book a Meeting

Refer & Earn $500

2. NPS surveys: Promoters

Goal: Get immediate referrals from promoters on your Net Promoter Score (NPS) surveys

Playbook:
If you're not already capturing NPS, Bullhorn Automation has a built-in engagement you can use. [Learn more about engagements in Bullhorn Automation.](#)

For existing ambassadors

- Click **Add Automation** and then **Blank Automation**

- Select **Candidate-based**

- Name your automation
  (example: Share Referral Program with NPS Promoters – Existing Ambassadors)

- Choose automation type **Standard,** then click **Save**

- Click **Create New List**

- Name your list
  (example: Promoters Who Are Ambassadors)

- Choose list type **Always Updated**

- In the drop-down, select **Taken Engagement** and specify:
  - ▶ Candidate based
  - ▶ Candidate NPS (Survey)
  - ▶ Answered: "How likely are you to recommend YOUR COMPANY NAME to a friend or colleague?"
  - ▶ With answer: 9, 10
  - ▶ Within last: 60 days

- Click **Add Condition** and specify **And**

- In the drop-down, select **Ambassador** and specify:
  - ▶ Is
  - ▶ Yes

- Click **Save**

- Include any relevant suppression lists

- Click **Save**

- Click **+** to add a new step

- Click **Send Email**

- Compose your email
  - ▶ Include ambassadors' dashboard links
    - ○ Click **Merge Tags** > Candidate Ambassador URL

- Click **Save**

- When you're ready, turn on your automation!

2. NPS surveys: Promoters

Example email to existing ambassadors:

New Message — ↗ ✕

Hi [First Name],

Thank you for your positive rating on our recent survey.

Since you had a good experience, I thought I'd share our referral program in case you know anyone who might also enjoy working with us.

Do you know anyone looking for a job? Share your referral link with friends and family. If they get hired, you both earn a bonus.

Refer & Earn $### [Link to ambassador dashboard using "Merge Tags"**]**

Once your referral meets the program requirements, we'll send you $### to say thanks for the referral.

Have a great day!
[Recruiter Signature]

Send ▾ 📎 🔗 ☺ 🖼   ⋮ 🗑

2. NPS surveys: Promoters

Goal: Get immediate referrals from promoters on your Net Promoter Score (NPS) surveys

Playbook:
If you're not already capturing NPS, Bullhorn Automation has a built-in engagement you can use. [Learn more about engagements in Bullhorn Automation.](#)

To invite new ambassadors

- Click **Add Automation** and then **Blank Automation**

- Select **Candidate-based**

- Name your automation
  (example: Share Referral Program with NPS Promoters – Not Ambassadors)

- Choose automation type **Standard,** then click **Save**

- Click **Create New List**

- Name your list
  (example: Promoters Who Are Not Ambassadors)

- Choose list type **Always Updated**

- In the drop-down, select **Taken Engagement** and specify:

  - ► Candidate based
  - ► Candidate NPS (Survey)
  - ► Answered: "How likely are you to recommend YOUR COMPANY NAME to a friend or colleague?"
  - ► With answer: 9, 10
  - ► Within last: 60 days

- Click **Add Condition** and specify **And**

- In the drop-down, select **Ambassador** and specify:

  - ► Is
  - ► No

- Click **Save**

- Include any relevant suppression lists

- Click **Save**

- Click **+** to add a new step

- Click **Send Email**

- Compose your email

  - ► Include your company's Staffing Referrals Refer a Friend URL

    - ○ In Staffing Referrals, go to Settings > Developer Settings > Website Widgets

- When you're ready, turn on your automation!

2. NPS surveys: Promoters

Example email to invite new ambassadors:

New Message   — ↗ ✕

Hi [First Name],

Thank you for your positive rating on our recent survey. We're thrilled that you enjoy working with us!

Do you know anyone else who might be looking for a job? We're always looking for new talent to join the [Company Name] family.

We also have a referral program where you can earn [Ambassador Bonus] and your friend can earn [Applicant Bonus] when they get a job through us.

Here's a link where you can share our info with your friends and track the status of all the referrals you make and the bonuses you can earn:

Refer and earn [**Link to Refer a Friend page URL**]

Have a great day!
[Recruiter Signature]

Send ▾   📎 🔗 ☺ 🖼   ⋮ 🗑

3. Ambassador education

Goal: Provide ongoing content to ambassadors to reinforce the value of your referral program

Playbook:

- Click **Add Automation** and then **Blank Automation**

- Select **Candidate-based**

- Name your automation
(example: Referral Program Ambassador Education)

- Choose automation type **Standard,** then click **Save**

- Click **Create New List**

- Name your list
(example: Referral Program Ambassadors)

- Choose list type **Always Updated**

- In the drop-down, select **Ambassador** and specify:

  - ▶ Is
  - ▶ Yes

- Click **Save**

- Include any relevant suppression lists

- Click **Save**

- Click **+** to add a new step

- Click **Send Email**

- Compose your email

  - ▶ Encourage ambassadors to refer their friends
  - ▶ Remind them of the bonuses they can earn
  - ▶ Provide ideas for sharing their link (e.g., text it to a friend, share on social)
  - ▶ Include ambassadors' dashboard links
    - ○ Click **Merge Tags** > Candidate Ambassador URL

- Click **Save**

- Add more emails to your workflow
(recommendation: send 1 email each month for 6 months)

- When you're ready, turn on your automation!

3. Ambassador education

Example email:

New Message — ↗ ✕

Hi [First Name],

I hope all is well. I'm reaching out because you're an ambassador for our referral program and I wanted to remind you that we offer a bonus of [Ambassador Bonus] for everyone you refer who meets our requirements.

Easy ways to refer friends and earn bonuses:

- Are you a member of any professional groups on Facebook or LinkedIn? These are great places to share your referral link!
- Copy and paste your link into an email or text message. Or put it on your website, your blog, your Insta or TikTok bio…anywhere you think would be valuable for your network.
- Sync your email to share your link with one click.

Refer a friend and earn a bonus. **[**Link to ambassador dashboard using "Merge Tags"**]**

Let me know if you have any questions. And have a great day!

[Recruiter signature]

Send ▼ 📎 🔗 ☺ 🖼 ⋮ 🗑

4. Referred candidates who haven't yet been placed

Goal: Re-engage referred candidates who haven't been placed and invite them to join your referral program

Playbook:
If your invite triggers for Staffing Referrals are around interviews / submissions rather than placements, you'll need to adjust the conditions for this workflow.

- Click **Add Automation** and then **Blank Automation**

- Select **Candidate-based**

- Name your automation *(example: Referral Candidates w/o Placement)*

- Choose automation type **Standard,** then click **Save**

- Click **Create New List**

- Name your list *(example: Referred Candidates w/o Placement)*

- Choose list type **Always Updated**

- In the drop-down, select **Date Added** and specify:
  - ▶ Less Than
  - ▶ 6 Months Ago

- Click **Add Condition** and specify **And**

- In the drop-down, select **Referred By** and specify:
  - ▶ Has Referred By

- Click **Add Condition** and specify **And**

- In the drop-down, select **Does Not Have Placement** and specify:
  - ▶ More Than
  - ▶ 30 Days

- Click **Add Condition** and specify **And**

- In the drop-down, select **Ambassador** and specify:
  - ▶ Is
  - ▶ No

- Click **Save**

- Include any relevant suppression lists

- Click **Save**

- Click **+** to add a new step

- Click **Send Email**

- Compose your email
  - ▶ Include your company's Staffing Referrals Refer a Friend URL
    - ○ In Staffing Referrals, go to Settings > Developer Settings > Website Widgets

- Click **Save**

- When you're ready, turn on your automation!

4. Referred candidates who haven't yet been placed

Example email:

New Message   — ⟋ ✕

Hi [First Name],

Your friend [Ambassador name] referred you to me a while back because they thought you might
be interested in a job through [Company name].

Are you still looking for work? If so, I might be able to help. Please let me know if now would be a
good time for us to connect.

I would also like to invite you to **join our referral program** **[**Link to Refer a Friend page URL**]**,
where you can earn bonuses by referring your friends and family to work with us.

Have a great day!
[Recruiter signature]

Send ▾ 🔗 😊 🖼   ⋮ 🗑

Goal: Invite high-quality candidates without placements to join your referral program

Playbook:

- Click **Add Automation** and then **Blank Automation**

- Select **Candidate-based**

- Name your automation
(example: Silver Medalist Referral Program Invite)

- Choose automation type **Standard,** then click **Save**

- Click **Create New List**

- Name your list
(example: Silver Medalists)

- Choose list type **Always Updated**

- In the drop-down, select **Has Submission** and specify:

  - ▶ Less Than
  - ▶ 60 days ago

- Click **Add Condition** and specify **And**

- In the drop-down, select **Submission Job Is Open** and specify:

  - ▶ Is Not
  - ▶ Yes

- Click **Add Condition** and specify **And**

- In the drop-down, select **Does Not Have Placement** and specify:

  - ▶ Any Date

- Click **Save**

- Include any relevant suppression lists

- Click **Save**

- Click **+** to add a new step

- Click **Send Email**

- Compose your email

  - ▶ Include your company's Staffing Referrals Refer a Friend URL

    - ○ In Staffing Referrals, go to Settings > Developer Settings > Website Widgets

- When you're ready, turn on your automation!

5. Silver Medalists / Other submitted talent

Example email:

New Message — ↗ ✕

Hi [First Name],

While we're working on finding you the perfect position, I wanted to let you know about a different way you can earn some money through us.

We have a referral program where you can earn a bonus of **[Insert Ambassador Bonus]** if you refer someone who gets a job through us.

Refer a Friend & Earn $###. **[**Link to Refer a Friend page URL**]**

Let me know if you have any questions!

Have a great day!
[Recruiter signature]

Send ▼ 📎 🔗 🙂 🖼 ⋮ 🗑