Welcome to AFCS Salesforce

An Introduction and Overview of the AFCS custom-built instance of Salesforce.

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Introduction to AFCS Salesforce

What is it?

Salesforce is a web-based customer relationship management (CRM) platform. It has been fully customized to meet the needs for hiring Air Force civilians. This custom-built platform was specifically designed to align to AFPC/DP2T Talent Acquisition (TA) Division recruiting and hiring process.

It provides a central location for a candidate pool with associated resumes and other documentation, and it also provides integrated notes and workflow allowing for a seamless candidate review process.

It provides a FEDRAMP approved location to store, search, and review candidate PII.

Salesforce is the system of record for all segments of AFCS recruiting and hiring.

Benefit to AFCS

Salesforce will enable recruitment initiatives (marketing, advertising, job board postings, social media usage) to be accomplished under a single digital platform.

Recruiters will be able to manage and execute multiple recruitment actions and service multiple hiring managers, including the delivery of qualified applicants for hiring consideration and selection.

Individuals will apply for jobs that are created within Salesforce, and their applicant files will be stored and will include PII as well as resumes and other supporting documentation, which will be viewable by recruiters and hiring managers.

Jobs that are created within Salesforce are automatically populated on the afciviliancareers.com/find-a-job Job Board and map. Each job has a unique URL and a link directly to job application page on Salesforce. This link can be used to promote the job through various means, including postings to job boards, social media platforms, event announcements, and other advertising and marketing options.

How does it work?

The Talent Acquisition Lifecycle is the entire process by which new talent is discovered, identified, and evaluated to be a qualified candidate, invited to interview, evaluated, and either hired or rejected.

A Talent is a person who passes through various stages along the lifecycle, starting as a "candidate" and ending as a new hire or "employee."

The Candidate passes through several substages which include in-depth screening (resume submitted and undergoing evaluation), submission for approvals to hiring managers, interviewing and evaluating, and finally reaching the offered stage for job fulfillment.

Salesforce will allow AFCS to track each stage of the Talent Acquisition Lifecycle with a high degree of visibility into how many candidates are currently in each phase and how long it takes to move a Candidate through each phase alongside visibility on job closure.

Salesforce Process Overview

An overview of the Candidate Journey within Salesforce

From Need to Filled

The process below outlines the candidate journey within Salesforce, from a candidate's entry into the system with their online application and associated resume to the job being filled.

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New

- Candidate(s) that has NOT been assigned to a job i.e., is part of the talent pool to viewed by a recruiter
- Can be assigned to an open job as needed
- Serves as a database for potential candidates to fulfill open jobs

Recruiter Screening

- Candidate(s) that HAS BEEN assigned to a job(s) and is being vetted by the recruiter
- Stage populated and kept based on the status of the latest job application tied to a candidate
- Recruiter reviews data such as work history, geography, skills, etc.
- Recruiter captures notes about a candidate under the "Recruiter Notes" text box
- Recruiter makes the following dispositions, each of which activates an automatic process in Salesforce
  - Not Qualified - When a job applicant is deemed "not qualified" by a recruiter, they will receive an automatically generated email and be moved back to the general candidate pool
  - Not a Good Fit - When a job applicant is deemed "not a good fit" by a recruiter, they will receive an automatically generated email and be moved back to the general candidate pool
  - Hiring Manager Evaluation - When an applicant is approved for further review by a Hiring Manager, the Hiring Manager will receive an automatically generated email letter letting them know that a new candidate is in their queue for evaluation

Hiring Manager Evaluation

- Candidate(s) that a recruiter submits for review and approval to the assigned hiring manager
- Submission is prompted when the hiring manager name is selected in the "Assigned To" field
- Hiring manager captures notes about a candidate under the "Hiring Manager Notes" text box
- Approval process for candidate as part of this stage include the following statuses:

Candidate Review

- Selected by the hiring manager which will allow the listed candidate to move to the next stage
- Notification is auto-prompted to the recruiter and recruiting manager for status change on candidate approval

Interview

- A candidate must be in the "Candidate Review" stage to interview
- Hiring manager conducts interview with candidate
- Interview Date, Time, and Associated Notes added to the appropriate fields

No Offer

- Selected by the hiring manager which will remove the candidate from the job
- Stops the candidate lifecycle process and moves the candidate automatically to the "New" status
- Automatically removes the job from candidate-related list of "Active Job Applications"

- Notification is auto-prompted to the recruiter and recruiting manager for status change on candidate approval

Offer

- Selected by the hiring manager which will automatically convert the candidate to an "employee"
- End of the candidate lifecycle process and the start of the onboarding process
- As an employee, the individual will no longer show on the candidate pool

Roles

An overview of the roles, responsibilities, and level of access of different users within AFCS Salesforce

Hiring Manager

Responsible for approving/rejecting candidates for specific jobs and making the final decision on hiring of a candidate

- View all candidates, employees, jobs, job requisitions, job applications, activities, and events
- Approve candidates for interview and move job applications to Offer/No Offer stage
- Attach & Export files and attachments

Recruiter

Responsible for sourcing candidates to fill open jobs, creating job requisitions, creating events, and managing job applications.

- View all candidates
- Create job requisitions/submit for approval
- Create events
- Review job applications disposing candidates as Not Qualified, Not a Good Fit, or moving them to Hiring Manager Evaluation
- Request Hiring Manager licenses
- Interact with Hiring Managers to provide candidates for their review and approval
- Assign records to any user
- Attach & Export files and attachments
- Create and run reports as needed WITHOUT the ability to share it with others

Recruitment Manager

Responsible for managing recruiters, assigning jobs to a recruiter, updating job content, and approving job requisitions and events as needed.

Administrator

Responsible for assigning user licenses and roles and other Salesforce functionalities.

Candidate

An individual whose information is housed in Salesforce. A candidate can either be a part of the general (searchable) pool or database or under consideration (attached) to a specific job (as a job applicant) or event (as registered or an attendee). Data from a job application or an event will remain tied to the candidate as long as they remain in the database whether they were hired for a specific job or not.

Workflow Process by Role

Recruiters

Recruiters are responsible for searching for candidates to fulfill open jobs by performing functions of creating activities (emails, calls, tasks, etc.), creating job requisitions, and managing job applications. Recruiters screen candidates' resumes and determine qualifications before moving the candidate forward to a Hiring Manager for consideration. A recruiter can also search the candidate pool for qualified candidates and invite the candidate to apply to a specific job or requisition.

Requisitions

Requisitions are built by a recruiter based on a Hiring Manager's request for TA recruiting assistance. Requisitions are then submitted for approval to the recruiting manager. Approval of the requisition by a recruiting manager creates a Job. The creation of a Job includes a unique URL to be used on Social Media postings. The Job URL takes a candidate to an application page where they will fill out their information and upload a resume and other employment documentation. When the candidate submits their application, it is captured in Salesforce as a Job application.

Job Applications

The job applications are first reviewed by a recruiter for qualifications, and qualified candidates are moved to the Hiring Manager for review and disposition.

- Notification is auto-prompted to the recruiter and recruiting manager for status change on candidate approval

Events

Events are created by a Recruiter and contain information such as the event name, location, time and date of the event, open and close dates of candidate registration, position information, documentation needed for registration, and marketing and branding content. The creation of an event includes a unique URL for posting on social media and is used to market the event. The Event URL allows candidates to register for the event and upload resumes and other employment documentation. Hiring Managers and Recruiters have visibility of these candidates through the Candidate Pool and can review resumes and employment documents to schedule interviews. The event registration URL automatically tracks candidate registrations; Recruiters convert registrants to "attendees."

Hiring Manager

Hiring Managers have the ability to review resumes, schedule interviews, and evaluate candidates for the open position. If a Hiring Manager selects **No Offer**, the candidate receives an automated message and is returned to the candidate pool with the status of New.

Offer converts the candidate to an Employee within Salesforce. The Hiring Manager receives an auto message to start the AFPC "By Name Request" RPA process.

Candidate Journey Overview

New

The candidate is not under active review and is passively waiting in the system.

- Candidate(s) that has NOT been assigned to a job i.e., is part of the talent pool to be viewed by a recruiter or Hiring Manager
- Serves as a database for potential candidates to fulfill open jobs

Recruiter Screening

The Candidate has been assigned to a job and is being vetted by a recruiter.

- Stage populated and kept based on the status of the latest job application tied to a candidate with
- Recruiter reviews data such as work history, geography, skills, etc.
- Recruiter captures notes about a candidate under the "Recruiter Notes" text box

Hiring Manager Evaluation

Candidates that a recruiter has submitted for review to the assigned Hiring Manager

- Hiring manager captures notes about a candidate under the "Hiring Manager Notes" text box

Resume Review

Approval process for a candidate as part of this stage, which includes the following statuses:

- Selected by the hiring manager which will allow the listed candidate to move to the next stage
- Notification is auto-prompted to the recruiter and recruiting manager for status change on candidate approval

Offer Submitted

Automatically converts the candidate to an "employee."

- ○ End of the candidate lifecycle process and the start of the onboarding process
- ○ As an employee, the individual will be removed from the candidate pool

No Offer

Candidate is not chosen to move forward in the hiring process

- Candidate rejected
- Selected by the hiring manager, which will remove the candidate from the job
- Stops the candidate lifecycle process and moves the candidate automatically to the "New" status
- Automatically removes the job from candidate-related list of "Active Job Applications"