Maya AI

Recruitment Playbook

Strategies to increase interviews, hires, and production

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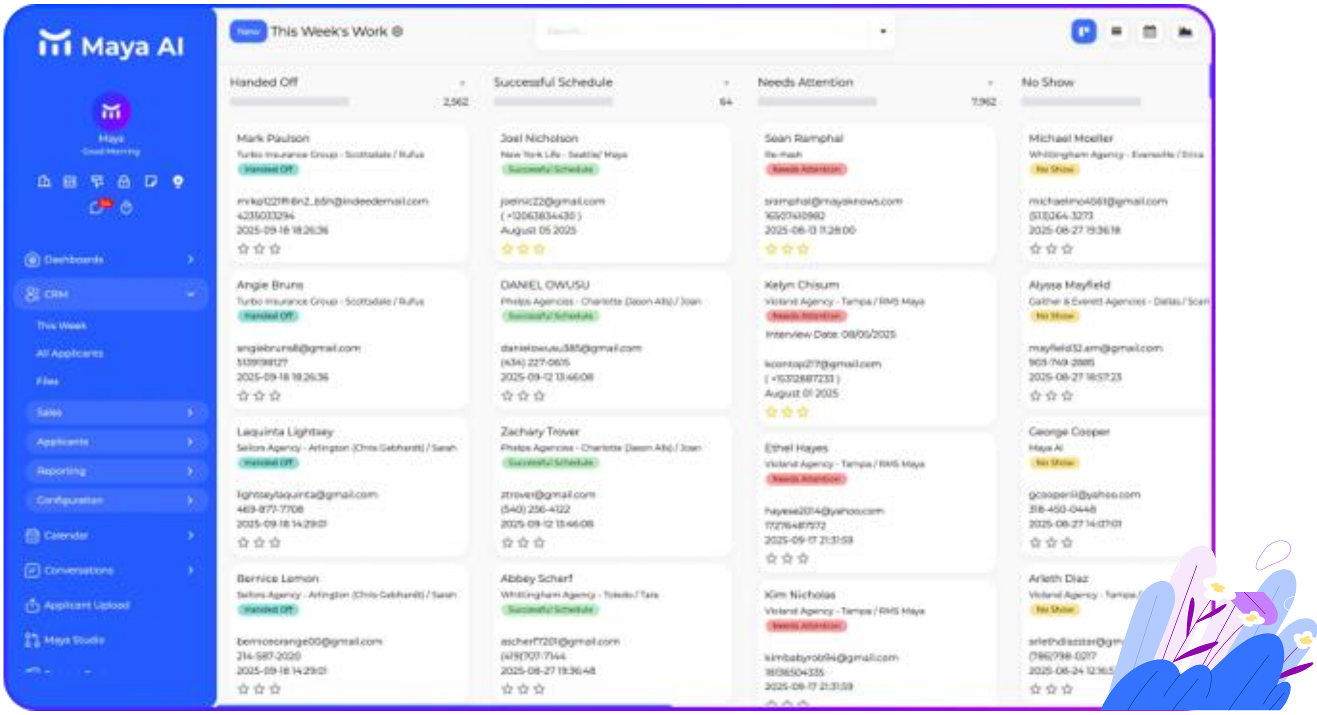
The Recruitment Center brings your whole hiring process into one place. It's designed to keep you focused, organized, and moving quickly with every applicant.



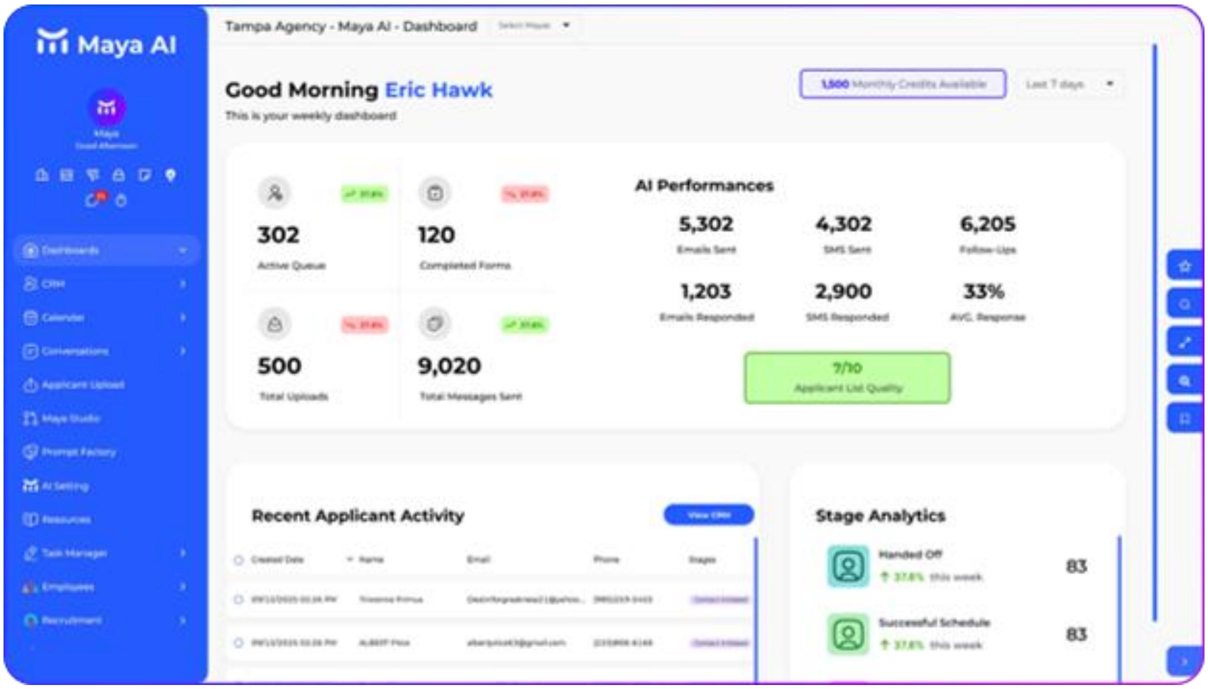
- Your main hub for managing applicants.
- Everything in one place; uploads, interviews, results.
- Built to make hiring faster, easier, and more consistent.
- This playbook is your step-by-step guide for daily and weekly success

State of Mind

While your team or Maya AI qualifies the candidates, it's your energy, consistency, and follow-through that take them across the finish line. Every applicant is an opportunity, and the faster you move with intent, the more hires you secure and the faster your agency grows.

Managing Your Weekly Dashboard

The Dashboard is your main hub. It gives you a quick view of your **recruitment activity,** from candidate progress to hires to credit usage. It's where you track your momentum and keep the pipeline moving.



Strategy to keep track of your performances:

Daily

- Review your Active Queue at the **start** and **end** of the day.
- Check for major shifts in **Applicant List Quality.**

Weekly

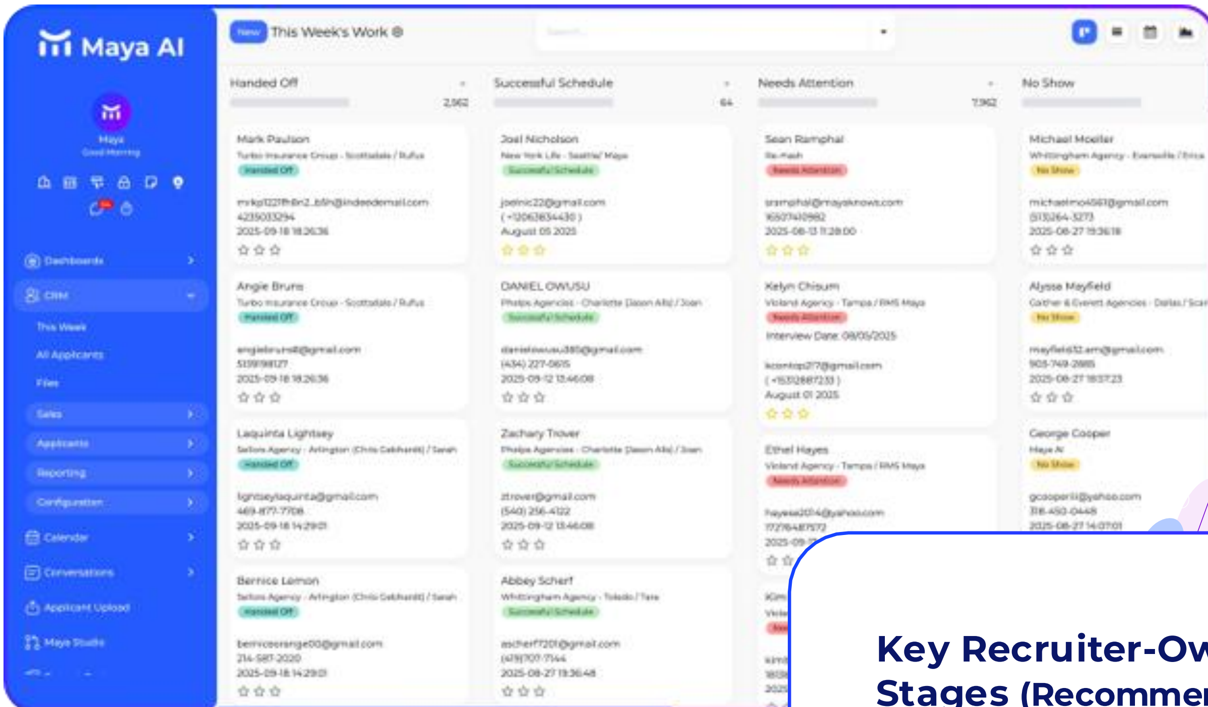
- Track Stage Analytics (**Handed Off** → Scheduled → Interview).
- Monitor uploads and messages sent to ensure the pipeline is steady.
- Measure contact rate (aim for 70%+).

Monthly

- Analysis on uploads & engagement to confirm ROI.
- Review response trends (emails/SMS → interviews).
- Spot bottlenecks (e.g., candidates stalling in one stage).

Easier Candidate Management

The Candidate Flow is your roadmap inside the CRM. Each stage tells you where the candidate is and what action is needed. Maya moves candidates automatically, but recruiters drive results in the stages where human contact matters.



- See the full journey of every applicant, from first contact to hire.
- Understand which stages Maya manages automatically vs. where you take over.
- Learn best practices for performing better at each stage.
- Use the flow as a map to prevent candidates from getting stuck.

Key Recruiter-Owned Stages (Recommended)

- **Handed Off**
- **Needs Attention**
- **Successful Schedule**
- **In Contact**
- **Awaiting Booking**
- **Hired**

➔ See Best Practices for Each Stage

Handed-Off - Stage

When a candidate is handed off, Maya has already completed the qualification checks and confirmed they meet the basic requirements. You'll receive an email notification letting you know the candidate is ready for recruiter contact. This stage is your signal to act quickly; candidates are most engaged in the first 24–48 hours. Reaching out immediately keeps momentum high, increases your chances of scheduling them, and prevents drop-off.

Why It Matters:

Moving fast here increases your contact rate and keeps your pipeline moving. The quicker you connect, the more likely the candidate will interview and convert into a hire.

- Respond the same day, no later than 48 hours.
- Call first, then follow up with text/email if no answer.
- Always log notes in the CRM after each attempt.

Do's and Don'ts:

✅ Do act quickly, while interest is high.

✅ Do personalize your outreach using candidate details.

❌ Don't let this stage sit, delayed action lowers conversion.

Suggested Script (Phone/Email):

"Hi [Candidate Name], I see <CUSTOM MAYA NAME> has already reached out to you about our position, and it looks like you've done well in the qualifications so far. I'd love to go ahead and schedule you for the next step."

Suggested Script (SMS):

"Hi [Candidate Name], this is [Your Name]. You've been pre-qualified for our position, and I'd like to schedule your interview. Do you have time to confirm today?"

Needs Attention - Stage

Candidates land in Needs Attention when they haven't been contacted in time after being handed off. This is a recovery stage, they were interested enough to qualify, but the delay risks losing them. Your responsibility is to act immediately and re-engage before momentum fades.

Why It Matters:

This stage directly affects your overall pipeline health. Clearing Needs Attention daily ensures no candidate is left behind and improves your conversion to interviews.

- Respond the same day candidates appear in this stage.
- Call first, then send a text/email if no answer.
- Always log every attempt in the CRM.
- Treat this stage as urgent, no candidate should sit here overnight.

Do's and Don'ts:

✅ Do act quickly to recover candidate interest.
✅ Do try multiple channels (call, text, email).
❌ Don't ignore this list or let it pile up.
❌ Don't move candidates forward without real contact.

Suggested Script (Phone/Email):

"Hi [Candidate Name], I wanted to follow up regarding your interest in our position. We'd love to get you scheduled for the next step and make sure you don't miss the opportunity. What day and time works best for you?"

Suggested Script (SMS):

"Hi [Candidate Name], this is [Your Name]. I'm following up about your application; we'd like to confirm your interview. Do you have time to schedule today?

No Show - Stage

A candidate enters the No Show stage if they miss a scheduled interview without notice. While this can be frustrating, it's important to follow up quickly to give them a chance to reschedule. If they remain unresponsive after one attempt, close them out so your focus stays on active candidates.

Why It Matters:

How you handle no-shows reflects professionalism and ensures accurate reporting. Quick follow-up gives genuinely interested candidates a second chance, while logging outcomes prevents your pipeline from becoming cluttered.

- Follow up within 24 hours of the missed interview.
- Make three attempt (call or text) to reschedule.
- If no response, log the outcome and move on.
- Don't let No Show candidates sit unaddressed in the CRM.

Do's and Don'ts:

✅ Do follow up quickly and offer a reschedule option.
✅ Do document the outcome clearly in CRM.
❌ Don't chase repeatedly, one attempt is enough.
❌ Don't leave candidates sitting in this stage for days.

Suggested Script (Phone/Email):

"Hi [Candidate Name], I noticed you weren't able to attend your scheduled interview. I'd be happy to help you reschedule if you're still interested. Are you available at [Day/Time Option]?"

Suggested Script (SMS):

"Hi [Candidate Name], this is [Your Name]. I saw you missed your interview today. Would you like to reschedule? Please reply to confirm."

Hired - Stage

A candidate enters the Hired stage once they've completed the process and accepted the position. At this point, your role is to close them out properly in the CRM and ensure they transition smoothly into onboarding.

Accurate closing keeps your pipeline clean and ensures the candidate moves quickly into licensing or training. This stage turns a successful recruit into a productive team member.

Suggested Tasks:

✅ Close the candidate record in CRM immediately.

✅ Add notes: start date, role, manager, and training status.

✅ Confirm candidate instructions for insurance licensing (if required).

✅ Hand off to training/onboarding team.

✅ Verify the hire appears in weekly/monthly reports.

Do's and Don'ts:

✅ Do log all hire details for reporting.

✅ Do coordinate with the manager for next steps.

❌ Don't leave hired candidates "open" in CRM.

❌ Don't skip final notes, it makes tracking and onboarding harder.

Next Step for the Candidate:

Begin insurance licensing (if applicable).

Start job training/onboarding with an assigned manager.

Following Up After No Response

Not every candidate will respond the first time. Consistent follow-up across multiple channels increases your success rate.

Best Practices / Tasks:

✅ Attempt contact at least 3 times (phone → text → email).
✅ Space attempts over 2–3 days, not all at once.
✅ Vary your message slightly each time.
✅ If still no response, log the outcome and move on.

Re-Engaging Cold Candidates

Some applicants express interest but go cold before scheduling. Don't abandon them too quickly — a smart re-engagement can bring them back.

Best Practices / Tasks:

✅ Send a friendly check-in message ("Still interested in moving forward?").
✅ Remind them of the role's key benefits.
✅ Keep tone positive, not pushy.
✅ If they remain unresponsive after 1–2 re-engagement attempts, close them out.

Handling Unqualified Candidates

Maya filters out applicants who don't meet requirements. Your job isn't to chase them but to learn from the data.

Best Practices / Tasks:

✅ Always log the reason (e.g., missing license, poor resume).
✅ Review disqualified applicants weekly to spot patterns.
✅ If you notice strong candidates being wrongly disqualified, escalate for re-check.
✅ Use patterns to improve job postings and sourcing filters.

Maintaining a Healthy Pipeline

Your goal isn't just to close hires but to keep the flow steady. A healthy pipeline means balancing today's actions with tomorrow's opportunities.

Best Practices / Tasks:

✅ Don't let early stages run dry, keep uploading/feeding new candidates.
✅ Track your upload-to-hire ratio monthly.
✅ Clear bottlenecks weekly (e.g., too many stuck in Needs Attention).
✅ Share insights with your AO to adjust strategy.

Keeping Candidates Warm Until Licensing

Many candidates may qualify and get hired, but they still need to complete their insurance license or pre-job training before starting. Keeping them "warm" during this waiting period reduces drop-off.

Best Practices / Tasks:

✅ Send a weekly check-in ("How's your licensing process going?").
✅ Share quick tips or resources to help them pass licensing faster.
✅ Celebrate milestones (e.g., passed exam, scheduled class).
✅ Encourage them by showing career growth stories or peer success examples.
✅ Always log follow-ups in CRM so progress is visible to managers.

Referrals & Expanding the Pipeline

Recruiting in an insurance company environment isn't only about each candidate; every applicant is also a potential source of referrals. Even unqualified or cold candidates may know someone else who's a fit.

Best Practices / Tasks:

✅ After qualification, ask: "Do you know anyone else who might be a good fit for this role?"

✅ Add referral names directly into CRM for follow-up.

✅ Incentivize referrals (recognition, small rewards, or advancement opportunities).

✅ Track referral sources to see which candidates bring in the strongest leads.

✅ Use referrals to keep even "lost" candidates positively engaged.

Creating Energy in Conversations

Candidates are more likely to stay engaged if they feel excitement about the opportunity. Your tone and approach can make all the difference.

Best Practices / Tasks:

✅ Share a short success story or example when reaching out.

✅ Highlight benefits: growth, stability, flexibility.

✅ Keep your communication positive and enthusiastic.

✅ Position scheduling as an opportunity, not just another step.

Document Everything in CRM

If it isn't logged, it didn't happen. Documentation ensures visibility for your team and prevents candidates from being lost in the shuffle.

Best Practices / Tasks:

✅ Log every call, text, or email.

✅ Note candidate feedback (interest level, concerns, availability).

✅ Update stage immediately after each action.

✅ Use notes for context so any recruiter can pick up where you left off.

Time Management for Recruiters

High-volume recruiting requires discipline. Setting routines helps you stay consistent and hit targets without burnout.

Best Practices / Tasks:

✅ Block morning sessions for calls (highest response rates).

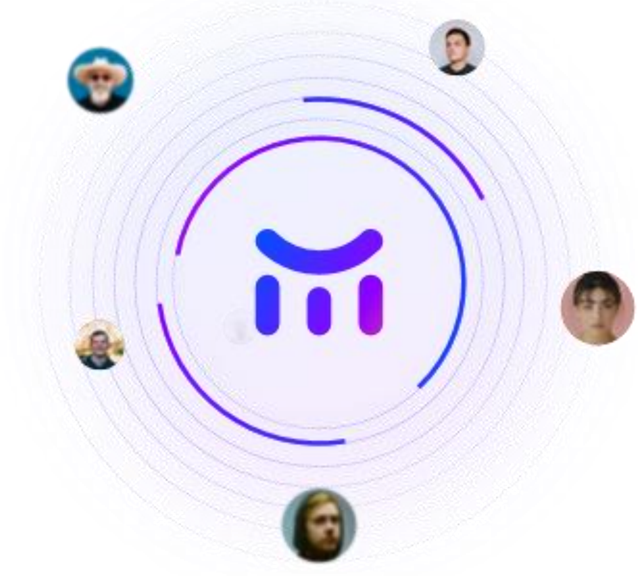
✅ Use afternoons for follow-ups and scheduling.

✅ End the day with a dashboard/CRM cleanup (no open tasks left behind).

✅ Limit distractions — work in focused sprints.

Handling Common Candidate Objection

Objections are not rejection. They're signals that a candidate is still engaged but uncertain. In fact, hesitation often means they're taking the opportunity seriously. A recruiter's role is to listen, validate, and reframe the concern into clarity and confidence. The key is understanding what's going through the candidate's mind — their point of view (POV) — and then responding with empathy, professionalism, and honesty.



Licensing & Resources

Candidate POV:

"I want this, but I don't have extra money for licensing or courses. Does that mean I can't move forward?"

This is one of the most common objections in insurance recruiting. The cost feels like a barrier, especially for those who may not have spare resources. But licensing is not a company fee — it's a state requirement and a professional credential the candidate will own for their entire career.

👉 Acknowledge directly: explain that it's state-mandated, not optional.
👉 Reframe as an investment: this isn't a sunk cost, it's their ticket into the industry.
👉 Provide support: share prep resources, study tips, and encouragement.
👉 Learn about their history: some candidates may have huge potential but limited means.

Quality doesn't always come from those with immediate resources — it lives in people who are determined to build something if given a path.

Income & Stability

Candidate POV:

“I need to know if this will really support me. I’ve heard commission can be unstable.”

This comes up because candidates compare the opportunity to traditional salaried jobs. The uncertainty feels risky.

👉 Clarify honestly how the pay structure works (commission, bonuses, overrides, etc.). Don’t hide it.
👉 Reframe around growth: income is performance-based, but scalable. The more effort and learning invested, the higher the return.
👉 Share proof: success stories or timelines of others who went from part-time beginnings to stable, full-time careers.

Time Commitment

Candidate POV:

“I’m already stretched thin with another job, family, or school. I don’t know if I can add more.”

This objection is rooted in fear of overcommitment.

👉 Validate: acknowledge it’s normal to start part-time.
👉 Reframe: emphasize flexibility, candidates can work around their existing schedules.
👉 Give a path: explain how part-time can grow into full-time as results compound.

Sales Experience

Candidate POV:

“I’ve never done sales before. What if I fail?”

The fear here isn’t about skill, it’s about confidence.

👉 Reassure: most successful agents didn’t have a sales background.
👉 Reframe: training, scripts, and mentorship are designed to support beginners.
👉 Encourage: share a story of someone with zero sales experience who succeeded by following the system.

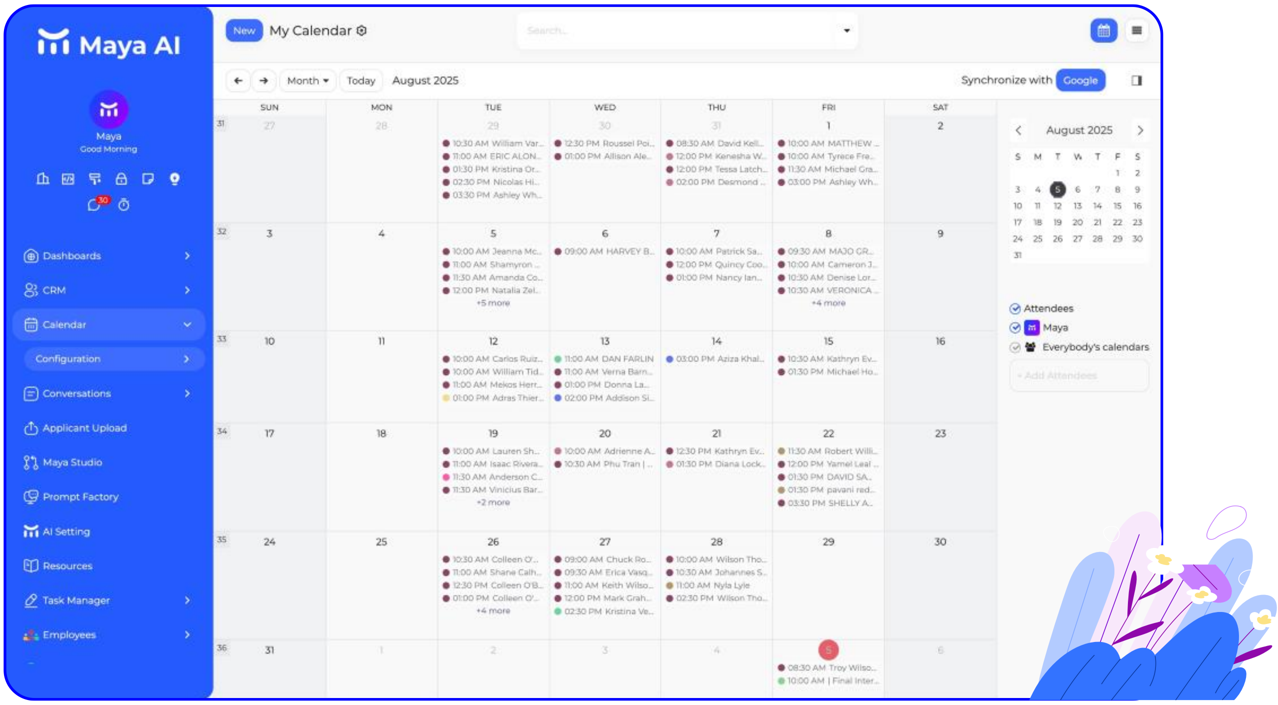
Advanced Handling

The best recruiters don’t just answer objections, they anticipate them. If you know licensing, income, or time will come up, bring it up early in the conversation with confidence. This builds trust and shows transparency.

👉 Learn their story: ask about past jobs, financial goals, and personal situation. It helps you tailor your response.
👉 Separate barriers from fears: some candidates truly can’t move forward (no availability, no willingness to invest in licensing). Others just need reassurance.
👉 Document everything: log objections in the CRM so patterns can be spotted and addressed at the team level.
👉 Use objections as filters: someone who pushes through hesitation often becomes a stronger, more committed hire.

Setting The Stage For Success

Once a candidate is qualified and you've made contact, the next step is to move them toward an interview. Scheduling can be handled either by Maya or by you, the recruiter, the key is making sure it happens quickly and cleanly.



Why It Matters

👉 Candidates are most likely to attend interviews booked within 48–72 hours of first contact.

👉 Proper prep ensures candidates arrive ready, reducing wasted interviews.

👉 A professional, well-structured interview builds credibility and keeps candidates excited.

Two Scheduling Options

👉 Option 1: Maya Schedules Automatically

- If calendar integration is active, Maya can book interviews directly with candidates.
- Bookings are automatically synced to your CRM and calendar.
- Great for saving time and avoiding back-and-forth.

👉 **Option 2: Recruiter Schedules Manually**

- If Maya is not enabled for booking, or you prefer personal outreach, you can schedule yourself.
- Offer 2–3 time slots to make scheduling simple.
- Enter confirmed details in CRM so it syncs with your calendar.

Before Scheduling – Clarifying Readiness

👉 Confirm the candidate has reliable transportation.
👉 Confirm access to a working laptop and internet.
👉 Confirm a clean background that meets state licensing requirements.

Interview Prep & Expectations

👉 Ask if they've watched the overview video. If not, have them watch before starting.
👉 Set the tone: this is a final interview; candidates should be prepared to commit.
👉 Confirm they are ready to pay for the state exam after the interview.
👉 Encourage them to come with questions, engaged candidates convert better.

During the Interview

👉 Start by revisiting clarifying questions (transportation, laptop, background).
👉 Review their understanding of the role and licensing process.
👉 Reinforce key success factors: effort, training, and commitment.
👉 Gauge motivation: Are they serious about moving forward quickly?