



CRM Email Campaign Playbook

TD SYNEX at IAMPHENOM26 – Best Practices

1. High-Level Principles

Start in Your Candidate Relationship Management (CRM) Platform First, Not LinkedIn

Candidates in Phenom CRM are warmer — they've visited your site, applied before, or engaged with your brand. Warm CRM audiences convert 3-4x better than cold LinkedIn outreach.

Persona Targeting Drives Results

Generic campaigns generate generic results. Tailor templates, messaging, and timing to specific candidate segments for higher engagement and conversion.

AI Accelerates Everything

Use your company approved AI to generate content in minutes. Deploy campaigns within 15 minutes after kickoff calls to capture momentum while role details are fresh.

Track the Full Story

Look beyond direct clicks to influenced applicants and source of hire attribution. Analytics reveal complete campaign impact—often 10x higher than click data alone.

ROI is Time vs. Outcome

Even 2-4 quality applications from 15 minutes of setup can result in a hire. That's an extraordinary return compared to hours of manual sourcing.

Adoption Needs Proof Points

Find early wins, amplify them loudly, and let peer success drive team confidence. One recruiter's 90-application campaign becomes the proof point that accelerates adoption.

2. Persona-based Template Best Practices

Phenom's Talent CRM combines flexible email campaigns, intelligent automations, and end-to-end analytics to help teams engage candidates at scale without adding manual work. From one-time and drip campaigns to always-on, automation-triggered journeys, teams can deliver timely, personalized messaging across the entire candidate lifecycle.

Start with 3-5 Core Personas

Build templates for your highest-volume or hardest-to-fill roles first:

- **Corporate/Office Roles** – Professional design, career growth messaging, company culture
- **Warehouse/Operations** – Visual imagery, shift details, location/commute info, benefits
- **Engineering/Technical** – Technology stack, innovation focus, team structure, projects
- **Maintenance/Skilled Trades** – Hands-on work emphasis, certifications, safety culture
- **University/Early Career** – Development programs, mentorship, campus partnerships

Template Design Elements

- **Visual Style:** Match imagery to role type (corporate office vs. warehouse floor vs. lab environment)
- **Messaging Tone:** Adjust formality—executive roles need different language than hourly positions
- **Content Focus:** Highlight what matters to that persona (tech stack for engineers, benefits for operations)
- **Regional Variations:** Localize language, cultural references, office locations (e.g., Japan template)

Subject Line A/B Testing

Test these four approaches to discover what resonates with each persona:

- **Curiosity:** “The opportunity you’ve been waiting for is here”
- **Clarity:** “Software Engineer role at [Company]—apply now”
- **Neutral:** “Update on your [Company] application”
- **Career-Oriented:** “Take the next step in your tech career”

Iterate Every 6 Months

Compare current template performance to older versions. Retire underperforming designs, double down on what resonates.

TD SYNnex Tip

Build a template library in Phenom, then use AI to customize copy for specific roles in 5 minutes.

3. Automation Recipe Ideas & Use Cases

Phenom CRM Automations let talent teams streamline repetitive tasks, automate candidate journeys, and scale personalization without relying on IT. By triggering actions based on candidate behavior, status changes, or timing, automations reduce manual effort while ensuring consistent and timely engagement.

The result is significant time savings, improved recruiter efficiency, and a smoother candidate experience that lets teams focus more on relationship-building and pipeline quality instead of administrative work.

Reengagement for Inactive Leads

- **Trigger:** Candidate inactive 5+ months (no site visits, no email opens)
- **Action:** Send updated role listings + “We’d love to reconnect” messaging
- **Use Case:** Recapture candidates whose circumstances changed—new skills, location moves, renewed job search

Location-Based Office Information

- **Trigger:** Candidate views role in specific region
- **Action:** Automatically send office tour invitations, local team info, regional benefits
- **Use Case:** Make remote candidates feel connected to physical locations they’re considering

Job Interest-Based Content

- Trigger: Candidate browses 3+ roles in same job family
- Action: Send team spotlight, day-in-the-life content, career path progression
- Use Case: Deepen engagement as candidates explore, moving them closer to application

Social Media Lead Nurture

- Trigger: Lead captured from Facebook/Instagram ads
- Action: Import to Phenom CRM → welcome email → 7-day nurture series → role-specific outreach
- Use Case: Convert social engagement to CRM pipeline (TD SYNnex: 41% hire rate on Colombia project)

Pre-Kickoff Pipeline for Recurring Roles

- Trigger: Hiring manager schedules intake call for recurring role
- Action: Send campaign 24-48 hours before meeting based on previous role requirements
- Use Case: Present qualified candidates during kickoff instead of promising to start sourcing

TD SYNnex Tip

Deploy campaigns immediately after kickoff using AI assistant. Present candidates before the call even ends.

4. Recommended Workflow

The 15-Minute Post-Kickoff Process

STEP 1

Complete Intake Call (Gather requirements, understand urgency)

STEP 2

Use Phenom AI Immediately (Generate email copy while details are fresh)

- “Build email campaign for Senior Software Engineer with 5+ years cloud experience”
- “Create CRM list of candidates who viewed engineering roles in past 90 days but didn’t apply”
- “Write re-engagement email for candidates who applied 6 months ago to tell them that the role is open again”

STEP 3

Build Targeted CRM List (Define criteria: skills, location, engagement history)

Start with warm audiences:

- Past applicants not selected (circumstances may have changed)
- Career site visitors who browsed but didn’t apply
- Previous campaign engagers who opened but didn’t convert
- Social media leads imported from Facebook/Instagram

STEP 4

Select Persona Template (Match template to candidate type and role)

STEP 5

Deploy Campaign (Send immediately, or schedule based on urgency)

STEP 6

Set Analytics Tracking (Monitor opens, clicks, influenced applications, source of hire)

For Recurring High-Volume Roles

Pre-build template campaigns before kickoff calls. Send 24-48 hours in advance to have warm candidates ready for the intake meeting.

ROI Benchmark: 15 minutes setup time for 2-4 quality applications that can yield a hire



3. How to Track Campaign Performance

Phenom Analytics app provides a comprehensive view of the entire talent journey, from career site traffic and apply funnels to hiring pipelines and campaign performance. Every user has access to actionable insights that connect engagement activity to real hiring outcomes.

With clear visibility into what's working, teams can optimize campaigns, improve conversion rates, and confidently demonstrate ROI to leadership using data that spans sourcing, engagement, and hiring.

Look Beyond Direct Clicks

Direct Metrics (what most teams track)

- Open rate: 40-50% benchmark for warm CRM audiences
- Click-through rate
- Direct applications from campaign link

Influenced Metrics (often 10x higher)

- Influenced applications: Opened email → visited site later → applied via different path
- Career site visits within 7 days of campaign send
- Job views for roles mentioned in campaign

How to Track Influenced Applications in Phenom

Filter by:

- Campaign Name
- Campaign Activity Status = Open
- Candidate Apply Date = 2-3 weeks after campaign send date

Attribution Metrics (prove ROI)

- Source of hire through MSR integration
- Time-to-fill for campaign-sourced candidates vs. other channels
- Hiring manager satisfaction with campaign-sourced candidates

Reframe Success This Way

- **Incomplete View:** 100 sends → 5 clicks → 2 applications = 2% success rate
- **Complete View:** 100 sends → 40 opens → 15 influenced applications + 2 direct applications = 17% success rate

Build Power BI Scorecards

Track by recruiter and region

- Campaign sends per month
- Open rates and engagement trends
- Apply rates (direct + influenced)
- Source of hire attribution
- Time-to-fill reduction

Benefit: Creates visibility, healthy competition, and identifies adoption gaps that need support

What to Monitor in First 48 Hours

- Check open rate (if below 30%, test different subject lines)
- Monitor apply rate (direct + influenced)
- Note which links get the most clicks (informs future content)
- Identify engaged non-applicants for recruiter follow-up

TD SYNnex Tip

Even low direct clicks can hide high influenced applications. Always check the full story in analytics before judging campaign success.

Key Results from TD Synnex

↓50%

Time-to-Fill Reduction (recruiter champion: From 70 to 35 days through high campaign adoption)

41%

Hire rate on urgent "29-role" project in under 30 days

90

Applications from single well-executed campaign

15

Minutes average setup time per campaign

Email Campaigns = Tracked Source of Hire
via MSR integration

Tools that Compliment Phenom CRM

- **AI Content Generation:** ChatGPT, Microsoft Copilot, Google Gemini, Claude
- **Social Lead Gen:** Facebook Lead Ads, Instagram Lead Gen, TikTok (for Gen Z)
- **Analytics:** Power BI, Phenom Analytics (influenced applications + source of hire)
- **A/B Testing:** Phenom native testing, subject line variations

“Don’t get discouraged by low numbers at first. Build your templates by persona, use AI to move fast, and track the full story in analytics—opens, influenced applications, not just clicks. Even 2-4 applications from 15 minutes of work can result in a hire. That’s the ROI lens that changes everything.”

Grant Smith

Global Recruitment Marketing Specialist



See how Phenom CRM can optimize your hiring process

[Book a demo](#)

