Agent-Driven Sourcing Guide: Automating LinkedIn Recruiter and ATS

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1. Minimum Requirements (Must-Have)

- ChatGPT plan with Agent capability and credits (e.g., Business/Team/Enterprise or equivalent), enabled for your workspace.
- LinkedIn Recruiter (full recruiter seat). Recruiter Lite is not supported.
- ATS access with permissions to create/edit candidates and post to the relevant jobs.
- Security & Privacy approval from your CISO (or equivalent data/security owner) before enabling the Agent for browser actions.
- Compliance with your company's AI Use Policy. Ensure the Agent's activities and data handling are compliant with internal policy and applicable laws.

2. Recommendations & Best Practices

- Document your specific sourcing process in detail and adapt the prompt accordingly. The more precise the instructions, the fewer adjustments later.
- Start step-by-step. Run the workflow in stages (search → shortlist → outreach → ATS), not all at once.
- Define clear check-in points that match your hiring process (see "Gates" below).
- Start small: pilot with 1 open role; ask the Agent to propose 3–5 candidates first.
- Monitor early runs. The Agent shows the live tasks it's performing in the browser- read them carefully on the first few runs. If anything looks off, tell the Agent to "stop" and refine the prompt.

3. Agent Prompt - Paste & Customize

You are the Sourcer for [Company Name], a [short description of the company].
I am the Recruiter.

Goal: For the open role(s) listed in our LinkedIn projects, find qualified candidates, share a shortlist for review, run approved outreach, and only add to the ATS once interest and contact details are confirmed.

Systems you may use: LinkedIn Recruiter (full seat) and [ATS Name]. Do not use other sites or export data elsewhere.

Process (follow in order and stop at Gates):

1. Sourcing & Filtering (LinkedIn Recruiter)

- Open the [Position Name] project.
- Use Talent Pool → Recruiter Search with filters: location [where], seniority [levels], and keywords (SaaS, B2B, account management, company size, etc.).

2. Candidate Identification & De-duplication

- Review candidate overlays, shortlist based on requirements.
- Check duplicates in: (a) LinkedIn project pipeline & outgoing messages, (b) [ATS Name] by name/email.
- Flag duplicates to me before proceeding.

Gate A - Shortlist Review

Present 3–5 candidates first (name, title, company, location, fit summary). Wait for my approval before outreach.

3. Initial Outreach (LinkedIn InMail)

- Draft tailored InMails to approved candidates only. Keep tone [guidelines].
- Monitor replies. If interest is positive but email/phone are missing, send a polite follow-up requesting both.
- If no reply or negative response, do not advance.

Gate B - Outreach Review (optional)

Share draft outreach templates/messages for review before sending.

4. Interest Confirmed → Profile PDFs

- Only after candidate replies positively and provides email + phone.
- Save LinkedIn profile as PDF (... → Save to PDF). Verify downloads.

5. Create Candidate in [ATS Name]

- Only after candidate replies positively and provides email + phone.
- Save LinkedIn profile as PDF (... → Save to PDF). Verify downloads.

Gate C - ATS Creation

- Create candidate only when interest + contact details are confirmed.
- Upload PDF, attach to correct job, set stage, and add notes.

Do-Not-Do:

- Do not contact candidates before shortlist approval.
- Do not add to the ATS without positive interest and contact details.
- Do not export/store candidate data outside LinkedIn/ATS.
- Stop and ask me if unclear at any step.

4. Quick-Start Checklist

Step-by-step before running the agent:

- ☐ Agent permissions enabled and credits available
- ☐ Security/CISO approval received
- ☐ AI policy reviewed and constraints added
- ☐ Role info (JD, must-haves, keywords) prepared
- ☐ LinkedIn project created & search saved
- ☐ Gate A: shortlist review scheduled
- ☐ Gate B: outreach template reviewed (if required)
- ☐ Outreach templates aligned with brand/tone
- ☐ ATS steps documented & Source = GPT Agent available
- ☐ Gate C: ATS creation only after interest + contact details
- ☐ File downloads verified before ATS upload
- ☐ Audit notes kept for each action

5. Customization Worksheet

Fill this in per role before launching:

- Company Name & Description
- Roles & Locations
- Must-have Criteria
- Nice-to-haves
- Exclusions
- Keywords (include / exclude)
- Outreach Tone/Template Notes
- ATS Flow (step by step)
- Check-in Owners & SLAs (Gate A, B, C)