

# Developing a Candidate Experience Strategy and Understanding for the Future



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Marketers have long known that purchasing is an emotional experience. From a prized toy to a first home, the purchasing process was simple even if the result was meaningful. Finding a job used to be the same way too: a simple and straightforward process to achieve an emotional goal.

Times have changed. Whether searching for the perfect purchase or the perfect job, the choices, the information, the influences, and the journey are more emotional than ever before. As times have changed, marketers recognize the best way to grow a business is to put themselves in their customers' shoes to truly understand their wants and needs.

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## THE CHANGING TIDE

Now, it is Human Resources' turn to think like candidates and employees. As a function, HR exists to drive the talent strategy of the organization. Given the role employees play in business success, HR leaders need to understand how candidates and employees feel and what they experience along their journey from awareness to employment through departure.

While employers try to better serve candidates, according to the Talent Board, a non-profit research organization, [more than 35 percent](#) of candidates do not receive an acknowledgment for an application. And [less than 20 percent](#) of employers seek feedback from candidates in early (pre-interview) stages of the journey. Yet for most organizations, the majority of candidates will not advance to the interview stage.

Forget hiring for a moment. An employer's candidate experience has a direct business impact. Talent Board's 2018 data shows that [46 percent of candidates](#) will decrease their relationship with an organization that delivers a poor candidate experience. It's essential organizations see candidate experience as a business imperative.

*“Candidates who believe they have had a ‘negative’ overall experience say they will take their alliance, product purchases, and relationship somewhere else. This means a potential loss of revenue for consumer-based businesses, referral networks for all companies, and whether or not future-fit and silver-medalist candidates apply again.”*

*Kevin Grossman, President, Talent Board*

## WHAT IS CANDIDATE EXPERIENCE?

The candidate experience is the cumulative set of interactions between an individual and the organization over the course of time from awareness of the organization to the relationship with the organization as an employee. It includes both conventional touch points, such as the application, and modern influences, such as social media, that impact a candidate’s understanding and perceptions of an organization as an employer.

Candidate experience is a subset of employer brand. Just as with a consumer brand—where the entire customer experience is branded, marketed, and operationalized—organizations should brand and market the entirety of the employment experience to be impactful. Candidate experience is the first half of that journey culminating in the employment experience. This holistic employment lifecycle offers a fundamental understanding for every HR professional.

## THE MODERN EMPLOYMENT LIFECYCLE

HR has been a function of process, so it’s no surprise that employment lifecycles and candidate experience models were built with an HR process lens. Most candidate experience models feature key stages as “application” or “hire.” These are HR process points. Not how candidates think about their experience. These models are also limiting. The candidate experience does not start with job awareness. It starts with awareness or knowledge that an organization exists.



This evolved employment lifecycle is a complete view of the candidate and employee's experience from their lens: what they experience end to end. The entire lifecycle is foundational to HR strategy and shifts years of a process driven mindset to a people-centered one.

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## CANDIDATE EXPERIENCE EVOLVED

*“Two decades after McKinsey coined the term ‘war for talent,’ there is relatively little evidence that companies have made tangible progress developing and implementing strategies to compete for human talent.”*

*Courtney Hamilton, David F. Larcker, Stephen A. Miles, and Brian Tayan Stanford Business School, 2019*

HR has historically struggled with making strides in strategic impact. As a function, its heavy focus on process may be to blame. Consider even the terminology used when talking about the function: application process, benefits process, orientation process, complaint process, staffing process. It's an endless focus on **process** responsibility. It's no wonder strategy gets lost or feels disconnected.

Many of the most utilized innovations in HR came from a process need. Consider the applicant tracking system (ATS). Almost every organization has one. The modern ATS was first invented in the late 1990s so HR could shift from paper resumes and hardcopy applications to online data collection and more effective, efficient compliance standards.

While these systems provide value to candidates, the design, structure, and technology are HR-driven, not candidate driven. The ATS is just one of many innovations or evolutions in HR designed to better the organizational process.

*“The difference maker in candidate experience isn't technology—although that has raised expectations and disappoints millions. The real difference is recruiters understanding and accepting the responsibility to each stakeholder in the process.”*

*Gerry Crispin, Founder, The Talent Board and CareerX Roads*

Herein lies a larger problem with HR. It is this process mindset that underscores a need to think differently about candidate experience. The experience matters. Experience has fundamentally propelled consumer brand and marketing leaders to overhaul and innovate the way customers experience their brands. Now it's HR's turn.

With that in mind, and in partnership with industry leaders at the [Talent Board](#), [CareerXRoads](#), and several Fortune 500 and high-growth companies, [exaqueo](#) has stewarded the development of a people-centered, modern employment lifecycle beginning with the candidate experience.

In this paper, the focus is on the candidate experience and it examines the journey from Understanding to Belonging. It presents a strategic model and measurement standards to be used and shared freely regardless of organizational budget, size, employee count, or even executive buy-in. It drives a unified and collective language HR professionals can use to shift thinking and better serve candidates and employees.

## BREAKING DOWN CANDIDATE EXPERIENCE

To build an experience around a candidate, it's essential to walk in the candidate's shoes and break down their journey with an empathetic lens. After all, experiences are all about emotion, and it has to be about what the candidate experiences, and not the HR process.

A deep assessment into the candidate journey yields four major phases a person experiences in their journey to employment. It's not just "I apply, I interview, I get an offer." Instead, it's reframed to focus on the journey each person takes in the experience which begins well before an application is submitted. This new thinking allows organizations to build a strategy around the entire journey and not HR's process.



### PHASE I: UNDERSTANDING THE ORGANIZATION

The first phase is Understanding and it is about having knowledge and awareness of the organization. This phase has two key steps:

- Knowledge: knowledge of the organization, what it does, and why it exists**  
 This is important for organizations who are not brand names or known beyond their location, industry, or B2B audience. But for all organizations, even well known ones, this is a pivotal step in the journey. It's paramount to understand the relationship candidates have (if any) with the organization and the brand first.
- Awareness: awareness of the organization as an employer**  
 Even if a candidate has heard of an organization as a brand or company, the candidate may have never considered them as an employer. This is an important distinction, especially when candidates may have preconceived notions that may cause them to ignore the organization as an employer or assume they cannot or should not work there.

## **PHASE II: ATTRACTION TO THE ORGANIZATION**

Once a candidate understands and is aware an organization exists as an employer, they go through a journey of Attraction. This phase has two steps:

- **Interest: recognition of and interest in the organization as an employer**  
This is the first point of consideration for a candidate of an organization as an employer and determining if there's a reason to investigate more. This is an important moment where the candidate is compelled to want to learn more or not.
- **Alignment: alignment with the organization as an employer**  
Alignment comes as a result of interest. It's where candidates seek a baseline of information about an organization to determine if the employer aligns to their basic needs and wants. For some candidates this is as straightforward as job title, compensation, location, or commute. For others, it includes factors such as organizational values, perceived business and/or personal growth, or company culture. It's this step towards research and education that ultimately propels the candidate to Preference or not.

## **PHASE III: PREFERENCE FOR THE ORGANIZATION**

The third phase is Preference—the point at which candidates and employers decide whether or not to take action. This phase also has two steps:

- **Consideration: review of opportunities, consideration, and application**  
As a result of alignment, here, the candidate is making a choice to apply over other options. During this step, and all steps to follow, the candidate continues to seek deeper alignment with the organization and job opportunities through numerous [sources of influence](#) both online (e.g., social media, employee review sites, and/or news sources) and offline (e.g., word of mouth influencers such as current employees, friends and family, and/or advertising).
- **Competition: competition against others for a job**  
Here, both the candidate and the company are in competition for each other. This includes the most familiar elements of the journey—phone screens, assessments, and interviews—but also includes touchpoints during this evaluative phase that may influence either the candidate or the employer. It also includes the readiness of both parties to make decisions.

## **PHASE IV: BELONGING TO THE ORGANIZATION**

The final phase, Belonging, is where the journey transitions from candidate to employee experience. This phase begins when both the organization and candidate make a commitment, and the candidate sees that commitment come to life. This phase has four distinct steps:

- **Decision: organization’s decision to offer employment and candidate’s decision to accept or decline**

The hiring decision includes the offer, any subsequent negotiation or discussion, and decisions made as a result by both the candidate and employer. It may include interactions with multiple people to help drive or encourage decision-making, and the review of additional information including background checks, and offer details.

- **Commitment: commitment to the organization and the role**

This step is where a candidate commits to the organization by sharing the decision with others. This important moment signifies a promise made by both the candidate and the organization. It includes communication of the change to a candidate’s current employer and any formal (i.e., press release) or informal announcements (i.e., social media post). This is an important part of the journey as candidates, especially in a strong market, may [go back](#) on their decision.

- **Orientation: onboarding into the organization and the role**

Onboarding into both the role and the company are essential steps for every new employee and is a moment that matters in the employment lifecycle. This step includes all communications, technologies, meetings, and manuals that enable employees to learn about and acclimate to their new sense of place, position, and purpose.

- **Belonging: making a valued contribution with the work**

It’s important to note that even with the moniker of ‘employee,’ a new hire often questions their decision until they feel like they are making a contribution that is valued by the organization. The final step in the journey, here is where the candidate-now-employee sees the impact of their work and feels engagement with their colleagues and the organization. This is also where the candidate experience overlaps with the employment experience, as shown in the full employment lifecycle on [page two](#).

The four-phase, 10-step journey of candidate experience encompasses the general course candidates take. Every organization has a different set of actions and activities that happen along the way, and every candidate may behave differently, spending varied amounts of time at each step. What’s most important is to use this candidate experience journey as a strategic guide and shift the language from the HR process steps HR to the lens of the candidate. Seeing the journey in motion can serve as a guide.

## CANDIDATE EXPERIENCE IN MOTION

With an understanding of what the journey looks like when the candidate is at the center, it's now important to understand how candidates progress through the journey.



First, the journey is mapped as a circuitous flow with the colored path and white arrows. There are ups and downs for both the candidate and the employer, and the speed can change wildly for both parties. A candidate may move fast through one phase and slow through another. Or may go months without hearing anything, only to be fast-tracked through Preference.

The same can be said for the employer, especially when economic conditions are in the candidate's favor. An employer may have to move faster or be patient as the candidate weighs other options and decisions.

The gray circles demonstrate the fluidity of participants. The journey typically is not a complete one, as most candidates do not make it all the way through. The gray arrows demonstrate the movement of candidates who are constantly moving in and out of the journey as they return to varying stages depending on the outcomes at each step. Candidates may leave for good, return to earlier stages, or return at a later time. All of this movement is important when considering the effect of the candidate experience.

*“Organizations tend to focus on the candidate experience for those candidates who progress all the way through to offer, commitment, and onboarding. Yet the departure of candidates at every stage is significant as candidates share their experiences—good and bad—and influence others who may go through the candidate journey, or, choose not to based on what they’ve heard.”*

*Susan LaMotte, CEO, exaqueo*

Finally, there is a single white arrow from Belonging to Preference. This arrow represents internal mobility as employees seek consideration for new roles—an oft-forgotten part of the candidate experience. Considering the experience for internal candidates is a key to employee

engagement and retention. And internal candidates are often influential to other candidates and employees as well.

Internal mobility can happen when employees stop making a contribution or have contributed all they can to a role. A shift happens. It could be from a promotion or a feeling that it's time to pursue something different or more challenging. Either way, these employees are already aligned with the organization, but become candidates again at the Preference phase.

Visualizing the full journey is the first step to candidate experience strategy. It serves as an organization's baseline to understand the journey from the candidate's point of view. This ultimately allows organizations to assess which phases and steps are most important, influential, or compelling to candidates. Ultimately, organizations need all candidates to experience a positive journey, whether they join the organization or not.

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## MEASURING CANDIDATE EXPERIENCE

Having a foundation to work from is essential. But the real value is putting it to the test. Beyond the baseline visualization of the model is a measurement methodology. This enables organizations to identify where the important, influential, and/or compelling moments are happening across the candidate experience journey. Once identified, the methodology offers a framework in which to objectively assess how an organization is delivering on the experience within those moments.

Organizations can begin this step using a macro lens by looking at the experience for all candidates as a whole. From there, the same methodology can be applied to talent segments important to the organizational or talent strategy. Examples include assessing the candidate experience specifically for high volume jobs, roles in specific locations, on-campus hires, executives, or specific target hiring goal groups such as women in technology.

On top of the candidate experience model is a four-level measurement scale used to assess the experience at each step.

- **Subpar:** This is where an organization is falling below a candidate's minimum expectations. For example, in the Consideration step, if a candidate applies for a job and never receives a confirmation her application has been received, that is a subpar indicator.
- **Satisfy:** This is where an organization is meeting a candidate's basic expectations. The same candidate (as in the subpar example) receives a general scripted note confirming

application receipt and advising of notification only if the application meets the organization's hiring criteria. That standard acknowledgement meets basic expectations.

- **Engage:** This is where an organization begins to connect with a candidate's emotions. This is important because exploring new opportunities—whether voluntarily or involuntarily—is an emotional experience for people. When organizations engage with candidates in the experience, they humanize and ease the journey. For example, instead of a scripted confirmation, the candidate receives a personalized reply, a general timeline on what to expect next, and links to relevant content on the organization's website.
- **Captivate:** The final level of measurement is captivate. Here the candidate receives completely personalized attention and the organization anticipates their needs. In this example, the candidate receives a timely response to their application with a personalized timeline for reply, assignment to a specific recruiter who can directly answer all questions and with whom they can call, text, or email, along with custom-curated content related to the job, location, team, hiring manager, or project they applied for.

It's important to note that organizations may find it impossible—and likely should not aim—to captivate at every level for all candidates. It may not be possible at certain steps for high volume hiring or evergreen requisitions.

Even more significant to note is what an organization's own assessment may uncover: steps that matter most to executive candidates may be different from the steps that matter most or are most influential to early career hires.

With the four levels of measurement in hand, organizations can now audit the current state of candidate experience and measure their performance along the journey. Determine the best data sources, considering all four phases and each of the 10 steps, and begin gathering all available and attainable data..

Existing, in-house qualitative and quantitative data sources often include:

- HRIS team and/or recruiter dashboards
- Hiring manager and/or new hire surveys
- Career site surveys and/or traffic data (e.g., Google Analytics)
- HR leaders applying for their own organization's jobs and detailing the experience
- Focus groups or interviews with candidates, recruiters, new hires, and hiring managers

This assessment of existing data sources will likely yield gaps, especially at the Understanding and Belonging phases. Soliciting external support in the form of partners can yield more comprehensive and impactful data sets, and eliminate unwanted bias.

External support may include:

- [Candidate Experience Awards](#) research and benchmark program (run by the nonprofit Talent Board)
- Third-party consultants or research partners
- HR technology providers
- Survey tools or service providers

The commitment to start is the most important part, regardless of budget and resources. The next step is to make an assessment of how the organization currently delivers on candidate experience based on the data at hand.

Mapping the current state by phase and step visually identifies where strengths and gaps lie for the organization. This can be done with a single ‘current state’ line as visualized below.



After the assessing and mapping current state of the candidate experience, next comes defining the goal state. Here, it is important to look inward and not copy or mimic what other organizations are doing. Organizations should instead focus on their own unique data to identify the highest priority areas based on talent strategy, business competition, hiring needs, and resources.

For example, if organization research indicates the Competition step is very influential because candidates really value the frank conversations with hiring managers, it's essential to focus on that step in the experience.

If research shows very low awareness of the organization as an employer as a roadblock to the experience, yet the organization has extensive growth plans and lofty hiring goals ahead, prioritizing brand awareness will be essential.

To begin data assessment, consider the following questions:

- What steps did candidates identify as most influential or impactful?
- What activities in those steps were most often cited?
- Where are the biggest areas of opportunity?
- What opportunities can be addressed or remedied simply compared to areas that will require more complex or costly solutions?
- Is the experience subpar in any areas and how can those areas be prioritized to meet a satisfaction baseline?
- Are there differences in data between declined candidates and those receiving offers?

Once the assessment is complete, organizations can add a second line to track goal state as visualized below. This indicates where an organization wants to elevate the experience at the moments that matter most in the candidate’s journey.

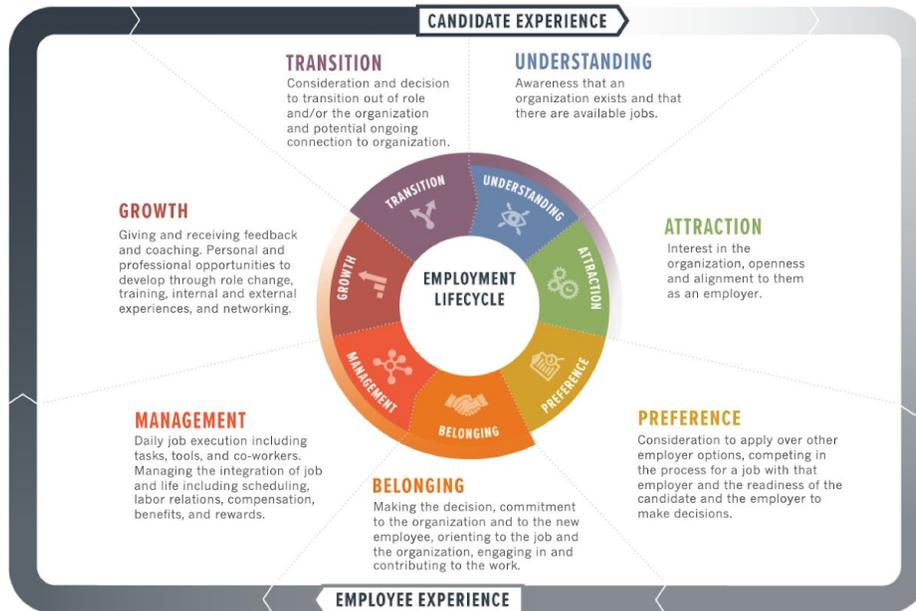


This identifies the most important moments that matter in the candidate experience. It allows organizations to see the gaps in their current state experience and serves as the strategic roadmap to determine the activities and actions needed to reach their intended goal state. Ultimately, all organizations should strive to satisfy and meet expectations at each step on the journey to effectively deliver to candidates.

## BRINGING IT ALL TOGETHER

The model demonstrated here illustrates only the first part of the full employment lifecycle: the candidate experience. To truly see the candidate and employee at the center of the entire

experience, referencing back to the full lifecycle is essential. In addition to the four phases of the candidate experience, there are three identified phases in the employment experience as depicted below in the full lifecycle.



The three phases in the employee experience are:

- **Management:** this phase is the management of job, career, and life including some of the core reasons employees work—compensation and benefits—and to the daily experience on the job and the life events big and small that affect employees’ work and ability to deliver.
- **Growth:** this phase of the lifecycle references the internal and external experiences that help employees grow at work both personally and professionally including performance management, coaching, and learning opportunities.
- **Transition:** this phase signifies the shift out of an organization or a role. If transitioning out of the organization, it also refers to any ongoing connection the employee might have with the organization as an alumni. The fade indicates that the employee may shift into another stage especially if there’s a preference to consider and compete for another role or job in the organization.

As with every journey, there are many touchpoints at every phase in the process from candidate through employee experience. Researching, documenting, understanding, and acting on those touchpoints, especially the most compelling moments that matter to an organization's candidates and employees, can help more effectively brand and market the employment experience. This results in attracting talent who will thrive in the organization, repelling talent who may not, and providing a fair, honest, and communicative experience along the way for every candidate and employee.

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## FOR MORE INFORMATION

Learn more about the stewards of the modern employment lifecycle and candidate experience models:

- [CareerXRoads](https://cxr.works)      cxr.works
- [exaqueo](https://exaqueo.com)      exaqueo.com
- [Talent Board](https://thetalentboard.org)      thetalentboard.org

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## ABOUT THE AUTHORS

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She has an MBA in Human Resources and Marketing from Vanderbilt University where she was a Dean’s Scholar. She also has an MA in Human Resource Development from The George Washington University and a BA in Communications and Public Relations from Virginia Tech.

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Her work has received awards from Glassdoor, Graphic Design USA, and Potentialpark Group. She has been named a Top Employer Brand Influencer, quoted in *Misplaced Talent* (2015, Wiley) and *The Robot-Proof Recruiter* (2019, KoganPage), and featured by the Society for Human Resource Management and Business Insider. Shannon graduated with honors and a BA in Speech Communication from Shippensburg University.

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