



## Careers@Harvard Tagging Resource Guide

**Purpose:** This document outlines expectations and best practices for using the tagging feature in Careers@Harvard for candidate management. By leveraging the practices in this resource guide, we aim to enhance talent pipeline development, strengthen knowledge-sharing, and maximize the efficiency of our recruitment process.

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## Introduction

SmartRecruiters offers tagging functionality that streamlines candidate management and supports targeted, effective recruitment campaigns.

## What are Tags and Why Use Them?

Tags are descriptive words attached to a candidate's profile that summarize skills, experience, or other relevant traits. Using tags:

- Makes it easier to search and filter candidates based on specific criteria.
- Provides a structured way to group and categorize candidates, and enables talent pooling of those with similar backgrounds or qualifications.
- Helps with sourcing strategy effectiveness and can significantly speed up the sourcing process, allowing for the quick identification of previously screened or qualified candidates for new roles.
- Helps recruiters to build pipelines for future hiring efforts, and to improve long-term strategies.
- Assists with creating effective campaign strategies, targeting specific communications to specific audiences.
- Creates enhanced reporting and analytics capabilities to evaluate the effectiveness of outreach efforts.
- Helps to prevent duplication and increase consistency in sourcing efforts.

## Guidelines for Effective Tagging

SmartRecruiters allows for unlimited tagging in the system. Any recruiter can create and apply any tag to any candidate, at any time. An open structure of this nature is helpful for real-time use, but can cause adverse sourcing effects if not managed appropriately. The following are guidelines for effective tagging in the system:

- **Consistency:** Use tags consistently—consistent tagging increases long-term value and usability.
- **No Acronyms or Abbreviations:** Avoid using short forms. For example, use “Talent Acquisition” as a tag rather than “TA”.
- **Tag Limits:** Limit the number of tags left per candidate; it is suggested to apply only 3-5 tags per candidate, being the most relevant tags per that candidate's profile.
- **Clarity & Shared Value:** Avoid overly personal or workflow-specific tags. Any tags applied should be helpful to any/everyone viewing that candidate.



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- **Searchable & Actionable:** Only create tags that will help find or group candidates for future use.
- **Compliance:** Never use tags that could be inappropriate or discriminatory. Consider how others may interpret your tags.
- **Maintenance:** Tags shouldn't be "set it or forget it". They require maintenance as a candidate's circumstances can often change.

## Tagging Functionality in Careers@Harvard

### Candidate Profile

Tags can be applied directly from an individual candidate's profile, from the Tags section within the right-hand column. Tagging here will apply those tags to that one candidate only.

### Applicants Tab on Job Profile

Tags can also be applied individually or in bulk from the Applicants Tab within a Job Profile. From this tab, select the candidate(s) you want to tag and then select the "Actions" menu which will open a list of options. Click on "Add Tags to Candidates", enter the tag(s), and click "Add Tags to Candidates". The tags will be applied to all candidate(s) that you have selected. You can also filter candidates by tags from this same tab, for ease of sourcing.

### People Tab

Lastly, you can also apply tags individually or in bulk from the People Tab, in the same manner as noted above. Select the candidate(s) you want to tag and then select the "Actions" menu which will open a list of options. Click on "Add Tags to Candidates", enter the tag(s), and click "Add Tags to Candidates". The tags will be applied to all candidate(s) that you have selected and you can filter candidates by tags from this same tab as well.

## Collaboration Best Practices

Tags created by you and your colleagues are a valuable knowledge sharing tool. They enable all recruiters to benefit from one another's candidate insights. With this in mind:

- As noted prior, avoid using tags that are meaningful only to you or specific to your individual workflow.
- Select tags that offer value and clarity for anyone who may review or manage your candidates in the future.
- Consider notifying colleagues when you create a new tag that could benefit the broader team, so everyone is aligned and can adopt it.
- Do not delete tags added by other recruiters.
- If you receive constructive feedback that one or more of your tags are unclear or redundant, be open and work together to update, merge, or clarify tags as needed.



## Tag Examples

The following is a list of example tags to use, based on commonly-recruited functions, roles, groups, experiences, and statuses. This list is not exhaustive and remember – because the tagging functionality is open in the system, it’s important that we collectively work together to manage them appropriately.

### Job Functions

- Alumni Affair and Development
- Communications
- Facilities
- Faculty & Student Services
- Finance
- General Administration
- Health Care
- Hospitality & Dining Services
- Human Resources
- Information Technology
- Library
- Research
- Technical

### Commonly Recruited for Jobs/Titles

- Executive Assistant
- Staff Assistant
- Talent Acquisition Partner
- Human Resources Business Partner
- Project Manager
- Financial Analyst
- Business Analyst
- Project Coordinator
- Grants Manager
- Data Analyst
- Fundraiser
- Doner Relations
- Software Engineer
- Cloud Engineer
- Research Assistant

### Key Profile Groups

- Internal Talent
- Silver Medalist
- Bronze Medalist



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- Boomerang
- Referral
- Agency or Search Firm Candidate
- Harvard Student or Alumni
- Harvard Extension School Student or Alumni
- Career Fair Attendee
- Contingent Worker
- Passive LinkedIn Lead
- CWD Professional Development Program Participant
  - Administrative Fellowship Program
  - Bridge Program
  - Harvard Internal Professional Pathways (HIPP) Program
  - Harvard Leadership Development Program
- Employee Resource Group Participant
  - Association of Black Faculty, Administrators, and Fellows (ABFAF)
  - Association of Harvard Latinx Faculty and Staff (AHLFS)
  - Committee on the Concerns of Women (CCW)
  - Harvard Asian Pacific Islander Desi Association of Faculty and Staff (HAPIDA)
  - Harvard LGBTQ+ Faculty and Staff (QERG)
- Pathway Program Participant
  - Year Up United
  - Summer Youth Employment Program
  - DOD SkillBridge
- Community Partner Participant
  - African Bridge Network
  - American Corporate Partners
  - Asian American Civic Association
  - City of Cambridge, Cambridge Employment Program
  - JVS/Mass Hire
  - La Colaborativa, The Chelsea Collaborative (CC)
  - Lifeworks Employment Services
  - MassAbility
  - Massachusetts Commission for the Blind
  - MassBio Biodiversity Program
  - Massachusetts Rehabilitation Commission
  - Operation Able
  - PowerCorps Program, Boston
  - Rian
  - Somerville Community Corporation
  - The Loop Lab
  - Transition Assistance Planning, Department of Navy
  - Work Without Limits
  - Work, Inc.



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### **Experience and Status**

- Executive Level
- Senior Level
- Mid-Level
- Entry Level
- Higher Education
- Willing to Relocate
- Actively Looking
- Keep Warm

## **Inquiries and Support**

For questions or clarifications regarding this resource guide, please contact the Harvard Human Resources Talent Acquisition and Outreach team.