The Automation Inventory: HR & Recruiting

113 tasks you can hand off, from the first requisition to offboarding

This is the idea menu. Every item on it is a task an HR or recruiting operation hands off once and stops touching - none of it hypothetical, all of it running in real organizations today.

Before you build any of them, run the test from the book: can this task be completed correctly, every time, without a human making a judgment call? If yes, automate it. If no, redesign it so the judgment happens separately, or keep a human on it. The line between automatable and not isn't complexity - it's judgment.

Use it the way you would a checklist: find the tasks that cost your team the most hours this week, and start there.

1. Sourcing and talent attraction

Task	How it runs
Job requisition approval routing	A submitted requisition routes to the right approvers in order, chases reminders until it clears, and opens the ATS req the moment it's approved.
Job description drafting from a role template	The role, level, and location merge into your job-description template and return a ready-to-edit draft.
One-entry posting to every job board at once	One approved req publishes to every board, your careers site, and social channels without re-entering it anywhere.
Boolean and search-string generation	The role's must-have skills generate the search strings for LinkedIn and each sourcing tool, ready to run.
Resume and profile parsing into records	An inbound resume or profile is parsed into structured fields and filed as a candidate record with no retyping.
Passive-candidate rediscovery from your own ATS	A new req searches your existing database first and surfaces past applicants who fit before you spend on sourcing.
Talent-pool tagging by skill, location, and seniority	Every candidate is tagged on entry so future searches pull the right pool in seconds.
Multi-touch sourcing outreach sequences	A sourced candidate enters a timed outreach sequence that sends each follow-up until they reply or the sequence ends.
Outreach-reply detection and routing	A reply pauses the sequence and drops the candidate into the owning recruiter's queue with the full thread attached.
Employee-referral intake and acknowledgment	A referral submission creates the candidate record, thanks the employee, and keeps them posted as the referral moves.

2. Job posting and requisition management

Task	How it runs
Requisition intake form to ATS record	A completed intake form creates the requisition with every field mapped, no recruiter re-entry.
Approval-chain reminders when a req stalls	A req sitting too long at any approver triggers escalating reminders until it moves.
Auto-expire and repost aging listings	A posting past its age limit closes or reposts on a schedule so stale listings never linger.
Posting-compliance check	Every posting has the required pay-transparency range and EEO language inserted before it goes live.
Cross-post to internal board and referral channels	Each new req publishes to the internal board and the employee-referral channel at the same time it goes external.

3. Application intake and candidate management

Task	How it runs
Application acknowledgment on arrival	Every applicant gets a confirmation the instant they apply, on every channel, with no one hitting send.
Automatic candidate logging into the ATS	Applications from job boards, email, and your careers site all land in the ATS as records automatically.
Duplicate-candidate detection and merge	A new application is checked against existing records and merged if it matches, keeping one clean profile per person.
Application-completeness check	Incomplete applications trigger a request for the missing items and flag the record until it's whole.
Source-of-hire tagging on every applicant	Each applicant is tagged with where they came from on entry, so source reporting builds itself.

4. Resume screening and shortlisting

Task	How it runs
Knockout-question screening on must-haves	Answers to must-have questions filter out applicants who don't meet the hard requirements before a human looks.
Resume ranking against role criteria	Resumes are scored against the role's stated criteria and ordered so recruiters read the strongest first.
Plain-language candidate summaries	Each candidate gets a short written summary of fit, so a recruiter reads a paragraph, not ten pages.
Transferable-skill matching	The match looks past exact keywords to adjacent skills and surfaces candidates a literal scan would drop.
Ranked shortlist for hiring-manager review	The top candidates are packaged into a shortlist with summaries and sent to the hiring manager to decide.

5. Candidate communication and engagement

Task	How it runs
Stage-based status notifications	Each stage change fires the right message to the candidate so they always know where they stand.
Timely, respectful disposition notices	Candidates who aren't moving forward get a prompt, courteous notice instead of indefinite silence.
Proactive "where you stand" updates	Candidates in a holding pattern get periodic updates so no one is left wondering.
FAQ auto-answers	Common questions on salary range, benefits, location, and status are answered instantly from a maintained source, day or night.
Pre-screen dialogue for must-have information	A short automated exchange gathers the must-have details before a recruiter spends time on the candidate.
Drip nurture sequences by stage	Candidates at a given stage receive a timed content sequence that keeps them warm without manual sends.
Re-engagement of strong past candidates	A new role automatically re-contacts qualified past candidates who fit, reviving warm leads.

6. Interview scheduling and coordination

Task	How it runs
Scheduling links sent at the interview stage	Reaching the interview stage sends the candidate a link that books against real availability.
Genuine-availability calendar integration	Booking pulls live calendar data so candidates only see times the interviewer can actually make.
Panel coordination across calendars and time zones	The system finds a slot that works for the whole panel across time zones and books it in one pass.
Automated confirmations and reminders	Both candidate and interviewers get confirmations and timed reminders so fewer slots are missed.
Self-service rescheduling	A candidate reschedules through the link, and every calendar updates without a single email.
No-show detection and follow-up	A missed interview is flagged automatically and triggers the follow-up or reschedule step.
Interview logistics sent automatically	The video link, address, and directions go out with the confirmation, no manual assembly.

7. Assessments and interviews

Task	How it runs
Assessment invitations triggered by stage	Reaching the assessment stage sends the right test automatically and tracks completion.
Assessment-score capture	Completed scores flow back onto the candidate record with no manual transcription.
Interview scorecards distributed	Every interviewer gets the structured scorecard for their session before the interview starts.
Interview-feedback collection with reminders	Feedback requests go out right after each interview and chase reminders until they're returned.
Feedback consolidated into one view	All interviewer feedback is gathered into a single view so the team decides from a complete picture.

8. Reference and background checks

Task	How it runs
Reference requests triggered at offer	Moving to offer sends the reference requests automatically and tracks each response.
Reference-response capture and reminders	Reference replies file to the candidate record, and non-responders get reminders.
Background-check ordering from the ATS	The check is ordered straight from the candidate record with no re-keying of their details.
Adverse-action sequence tracking	The FCRA two-step adverse-action flow runs on schedule with the required waiting period built in.
Screening status synced to the record	Check results update the candidate record automatically so status is always current.

9. Offers and negotiation

Task	How it runs
Offer-letter generation with pre-filled fields	Candidate and role data merge into the offer template, producing a ready letter with no retyping.
Offer-approval routing	The draft offer routes through the required approvers in order before it reaches the candidate.
E-signature collection with tracking	The offer goes out for signature and its status is tracked until it's signed.
Signed offer triggers onboarding	The moment the offer is signed, the onboarding workflow kicks off automatically.
Offer analytics	Acceptance rate and time-to-accept are tracked from offer data with no manual tally.

10. Pre-boarding and onboarding

Task	How it runs
Self-sending onboarding checklist	Acceptance triggers the full onboarding checklist to the new hire and the internal team.
New-hire paperwork collection and tracking	Required forms are sent, collected, and tracked so nothing arrives late or incomplete.
I-9 and work-authorization collection	Work-authorization documents are requested, collected, and chased until complete and on time.
Equipment and IT provisioning on signed offer	A signed offer opens the equipment and IT requests so hardware is ready by day one.
System-access and license provisioning	Account and license setup starts from the hire record so access is ready when they arrive.
Day-one schedule and welcome packet	The first-day agenda and welcome materials go to the new hire before they start.
Buddy or mentor assignment	A buddy or mentor is assigned and both people are notified automatically.
New-hire data pushed ATS to HRIS to payroll	Hire data flows from the ATS into the HRIS and payroll with no one re-entering it.

11. HRIS, data, and systems integration

Task	How it runs
Candidate-to-employee record creation	An accepted candidate becomes an employee record automatically, carrying every field forward.
ATS to HRIS to payroll field sync	Core fields stay in sync across the ATS, HRIS, and payroll so the systems never disagree.
Bi-directional status sync	A change in one system updates the others in both directions, keeping every record current.
Org-chart and reporting-line updates	A hire, promotion, or transfer updates the org chart and reporting lines automatically.
Single-source-of-truth reconciliation	Records are reconciled against the source of truth on a schedule so drift is caught and fixed.
Duplicate-record cleanup across systems	Duplicates are detected across connected systems and merged to keep one clean record per person.

12. Compliance and records

Task	How it runs
EEO and OFCCP data capture and reporting	Required diversity data is captured at the right stage and compiled into the reports on demand.
Pay-transparency compliance on every posting	No posting publishes without the pay range and required disclosures in place.
Document-retention scheduling and purges	Records are retained and purged on the schedule your policy sets, automatically.
Consent and disclosure logging	Every required consent and disclosure (CAN-SPAM, FCRA, AI-use notice) is captured and logged.
Audit-trail logging of automated actions	Each automated step writes an audit record so you can show exactly what happened and when.
I-9 re-verification reminders	Upcoming re-verification dates trigger reminders before authorization lapses.

13. Payroll and benefits administration

Task	How it runs
New-hire payroll enrollment	A completed hire record enrolls the new employee in payroll with no duplicate data entry.
Benefits-enrollment reminders and deadline tracking	Eligible employees are prompted through enrollment and reminded before the deadline.
Qualifying life-event routing	A reported life event routes to the right workflow and opens the eligible changes.
Payroll-change intake	Address and direct-deposit changes are collected through a form and routed for update.
Benefits-eligibility notifications	Employees are notified automatically when they become eligible for a benefit.

14. Time, attendance, and leave

Task	How it runs
PTO request intake and approval routing	A PTO request routes to the manager, updates the balance on approval, and notifies the employee.
PTO balance notifications	Employees and managers are notified of balances and low-balance thresholds automatically.
Timesheet collection and reminders	Timesheets are requested on schedule and chased until submitted.
Attendance-exception flagging	Missing punches and attendance exceptions are flagged for the manager automatically.
Leave-of-absence tracking and reminders	A leave request opens a tracked case with reminders for each required step and the return date.

15. Employee lifecycle and HR operations

Task	How it runs
Internal HR request intake and triage	Employee HR requests come in through one intake and route to the right owner as tickets.
Policy-acknowledgment collection	New or updated policies are sent for acknowledgment and tracked until everyone signs.
Employee data-change routing	A requested data change routes to the correct system owner and updates the record on approval.
Role and compensation change notifications	A role or comp change fires the right notifications to payroll, the manager, and the employee.
Internal mobility and transfer workflow	A transfer runs a workflow that updates systems, access, and reporting lines in one pass.
Probation-period review reminders	Approaching probation-end dates trigger the review reminder to the manager.

16. Performance and development

Task	How it runs
Review-cycle kickoff and reminders	A review cycle launches to every manager and employee and chases completion with reminders.
Goal-setting and check-in nudges	Employees and managers are prompted on schedule to set goals and log check-ins.
360 request distribution and collection	Feedback requests go to the right reviewers and are collected and compiled automatically.
Training assignment on triggers	A role change or event assigns the required training to the right people automatically.
Certification and expiration tracking	Certifications are tracked and renewal reminders fire before anything expires.
Learning-completion synced to the HRIS	Course completions flow back into the employee record with no manual update.

17. Employee engagement and surveys

Task	How it runs
Onboarding pulse surveys at 30, 60, 90 days	New hires get timed pulse surveys automatically and results roll up for HR.
Engagement-survey distribution and reminders	Surveys go to the right population on schedule and chase non-responders.
eNPS collection and roll-up	eNPS is gathered and rolled into a trend without anyone tallying responses.
Exit-survey distribution	A departure triggers the exit survey and files the results for analysis.
Survey results routed to the right manager	Results are split and routed so each manager sees only their team's feedback.

18. Offboarding

Task	How it runs
Resignation and termination workflow kickoff	A departure opens the full offboarding workflow across every system at once.
Access-revocation and equipment-return checklist	Departure triggers access removal and an equipment-return checklist with owners and dates.
Final-pay and COBRA notifications	The required final-pay and benefits-continuation notices are generated and sent on schedule.
Knowledge-transfer checklist	A departure opens a knowledge-transfer checklist so critical handoffs don't get missed.
Alumni and boomerang talent-pool tagging	Good leavers are tagged into an alumni pool for future re-engagement.

19. Reporting and analytics

Task	How it runs
Self-compiling weekly pipeline reports	Pipeline reports build from live data with no one copying between dashboards.
Time-to-fill and time-to-hire dashboards	The core hiring-speed metrics update automatically from ATS activity.
Source-of-hire and cost-per-hire roll-ups	Source and cost data roll into reports on demand from tagged records.
Diversity and DEI funnel monitoring	The funnel is monitored for drop-off by stage so gaps surface early.
Recruiter and requisition aging reports	Reqs and recruiter loads aging past target are flagged in a standing report.
Offer and acceptance analytics	Offer, acceptance, and decline data compile into a live view automatically.
Headcount and turnover reporting	Headcount and turnover update from HRIS changes with no manual reconciliation.