

Passive Candidate Outreach Checklist

A Recruiter's Guide to Building Relationships and Converting Passive Talent

CANDIDATE DETAILS

Candidate Name

Current Company

Current Role

Target Opportunity

Recruiter Owner

Date Added

1 Understand the Candidate Before Outreach

- ☐ Review candidate's career background and professional history
- ☐ Understand their current role and day-to-day responsibilities
- ☐ Identify key skills and areas of expertise
- ☐ Understand career goals and future aspirations
- ☐ Identify reasons they may consider a career move
- ☐ Note preferred role, industry, location, and work preferences
- ☐ Understand current challenges or frustrations (if shared)

2 Prepare a Personalized Approach

- ☐ Identify why this candidate is relevant for the opportunity
- ☐ Create a personalized introduction message
- ☐ Highlight specific experience or achievements relevant to the role
- ☐ Avoid generic recruitment messaging at all costs
- ☐ Prepare conversation points based on candidate interests
- ☐ Choose the right communication channel for first contact

3 Start the Conversation

- ☐ Introduce yourself and your purpose clearly
- ☐ Explain why you reached out to them specifically
- ☐ Focus on creating a genuine professional connection
- ☐ Ask about their career interests and goals first
- ☐ Listen before presenting the opportunity
- ☐ Make the conversation candidate-focused, not role-focused

4 Build Trust and Relationship

- ☐ Establish a regular and respectful communication cadence
- ☐ Provide relevant market updates and industry insights
- ☐ Share information that adds genuine value to the candidate
- ☐ Respect the candidate's current commitments and timing
- ☐ Maintain a positive relationship even if they are not ready now
- ☐ Keep detailed notes on candidate preferences and expectations

5 Present the Opportunity Effectively

- ☐ Explain why the role could be relevant to the candidate's career path
- ☐ Connect the opportunity clearly to their stated career goals
- ☐ Share authentic company culture, mission, and values
- ☐ Explain realistic growth and advancement opportunities
- ☐ Discuss role expectations, team structure, and working style
- ☐ Answer all questions honestly and with full transparency

6 Manage Candidate Interest

- ☐ Confirm the candidate's level of interest before proceeding
- ☐ Understand their motivation for exploring this opportunity
- ☐ Discuss and align on career expectations openly
- ☐ Align on compensation expectations and non-negotiables
- ☐ Confirm availability, notice period, and preferred timeline
- ☐ Address any concerns or hesitation directly and honestly

7 Guide the Candidate Through the Hiring Process

- ☐ Explain the full hiring process, stages, and expected timeline
- ☐ Prepare the candidate thoroughly for each interview stage
- ☐ Keep communication consistent — no candidate should be left waiting
- ☐ Share updates promptly after each stage of the process
- ☐ Collect honest candidate feedback after every interview
- ☐ Ensure a positive candidate experience from start to finish

8

Maintain Long-Term Candidate Relationships

- ☐ Keep strong candidates engaged for future opportunities
- ☐ Schedule future follow-ups with clear dates and actions
- ☐ Update candidate information regularly in your system
- ☐ Maintain genuine relationships after unsuccessful processes
- ☐ Build and nurture a long-term passive talent community

CANDIDATE RELATIONSHIP NOTES

CANDIDATE MOTIVATION

CAREER GOALS

KEY INTERESTS

CONCERNS / OBJECTIONS

NEXT FOLLOW-UP ACTION

FOLLOW-UP DATE

COMMUNICATION CHANNEL

FINAL RECRUITER REVIEW

- ☐ Candidate feels understood and valued throughout the process
- ☐ Candidate expectations are clearly documented in the system
- ☐ Full communication history is updated in recruitChamp
- ☐ Next action is clearly defined with a confirmed follow-up date
- ☐ Relationship is maintained regardless of outcome

"A strong passive candidate relationship today can become your next successful hire tomorrow. Every interaction builds trust — keep the relationship alive, even when the timing is not right."