THE NEOMA PLAYBOOK

The Recruiter's Claude Playbook

A guide to building helpful workflows in Claude. We'll walk you through connecting your tools, you copy the prompt and save yourself hours.

Built on Claude

THE SYSTEM

How this playbook works

1

One role, one folder

Every role you work gets its own folder in Google Drive, named [Role] – [Client]. Workflow 01 creates it for you and fills it with the documents all the other workflows rely on. As the role progresses, you drop CVs and your pipeline tracker in there too.

Senior Consultant – PeopleFirst Consulting

- Job spec
- Interview scorecard
- Question bank
- Candidate-facing job ad
- Hiring manager brief

+ CVs and tracker as the role runs

Workflow 01 builds all of this for you.

2

The prompts talk to that folder

You run these prompts in Claude Cowork with your Google Drive connected (next page shows you how). When a prompt says **read the job spec in the [Role] – [Client] folder**, Claude finds that folder in your Drive, reads what is inside, and saves its work back there. No uploading files into the chat every time; the folder is the shared workspace.

In a Microsoft shop? Swap Google Drive for OneDrive or SharePoint and Gmail for Outlook wherever they appear. The Microsoft 365 connector covers all of them, and every prompt in this playbook works exactly the same.

3

Anything in [brackets] is yours to fill

The coloured brackets are placeholders. Swap each one for your specifics before you hit enter.

THE PROMPT SAYS

Read the job spec in the "[Role] – [Client]" folder.

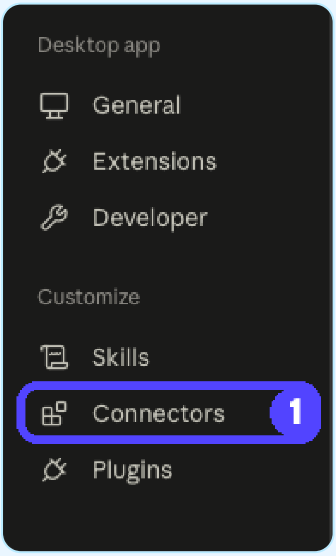
YOU TYPE

Read the job spec in the "**Senior Consultant – PeopleFirst Consulting**" folder.

ONE-TIME SETUP

Set up your connections

Every connector is a one-time setup, then every prompt in this playbook can use it. Here is where they live in Claude.



1 Open Settings, choose Connectors

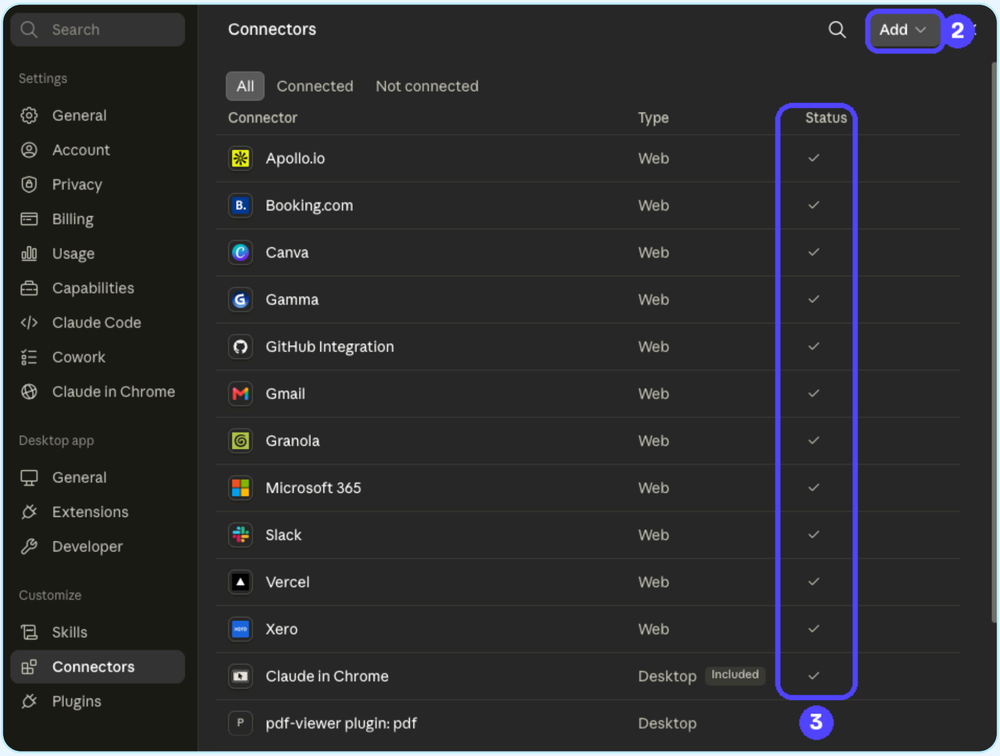
You will find it under Customize, near the bottom of the settings menu.

2 Hit Add and connect a tool

Browse the directory, pick the tool, sign in once. That is the whole ceremony.

3 Look for the tick

A tick in the Status column means you are connected and ready to run the prompts.



USED IN THIS PLAYBOOK

READ THIS FIRST

Three rules, then the prompts

Claude Cowork connects Claude to the tools you already run your desk on: M365, Drive, Gmail, your calendar, Slack, Notion, Apollo and loads more (check out the connectors). Each workflow in this playbook is a single prompt you paste in, fill out, and either run on demand or put on a schedule.

1. **Start at Workflow 01**

   Start from here, it'll build the role folder that all the other workflows read from. Skip it and the prompts in this playbook have nothing to go off!

2. **Don't send without review**

   These workflows are a draft for you to review. Claude can do the assembly, but you need to make the call.

3. **Schedule what repeats**

   A handful of these run daily or weekly. We'll show you how to put them on a schedule so they arrive automatically!

Run it safely

- Work in your company Claude workspace, not a personal account, so your organisation's data settings and access controls apply.
- Candidate CVs and contact details are personal information.
- Keep sensitive details out of prompts: health information, protected attributes, anything beyond basic work eligibility.

01

SETUP

Role intake pack

Give Claude your brief and it populates everything, job spec, scorecards, interview questions, the whole lot.

PROMPT TO COPY

Create a Drive folder named "[Role] – [Client]". From this intake brief: [paste], generate and save into it: (1) a job spec, (2) an intake meeting agenda with pre-session questions for the hiring manager, (3) a structured interview scorecard, (4) a candidate-facing job ad, (5) an interview question bank mapped to the scorecard, and (6) a hiring manager briefing note. Post a summary with links to Notion, and list anything missing from the brief as open questions at the top.

- *Run this first, every time. Like we said, every other workflow in this playbook reads from the folder it creates.*

CONNECTIONS

Drive

Notion

Folder

SCHEDULER

Run at intake

02

SOURCING

Talent pool sizing report

How many people fit this role in your market, and where to actually find them.

PROMPT TO COPY

Uses Claude's built-in web search, no extra connector needed

Read the job spec in the "**[Role] – [Client]**" folder. Using web search, size the talent pool for this role in **[market]**: estimated pool size with sources and a confidence level, the ideal candidate profile, a tier 1 and tier 2 breakdown by employer type and seniority, and three sourcing channels ranked by likely yield. One page, saved to the role folder. Where the data is weak or thin, say so rather than guessing.

- *The confidence level tells you whether to build your sourcing plan around this or go back to the drawing board.*

CONNECTIONS

Web search

Drive

Notion

SCHEDULER

Run at intake

03

TARGETING

Target company list builder

Queries Apollo against your ICP filters and hands back a tiered, scored company list.

PROMPT TO COPY

Requires the Apollo connector

Search Apollo for companies matching **[industry]**, **[headcount range]**, **[location]** and **[tech stack]**. Return **[n]** companies and score each against this profile: **[paste]**. Sort into tier 1 (strong fit), tier 2 (possible) and tier 3 (park for now), with a one-line reason each. Save to Notion as an editable table. Do not add anyone to outreach until I have reviewed the tiers.

CONNECTIONS

Apollo

Notion

Drive

SCHEDULER

Campaign start

04

ASSESSMENT

Profile tiering for outreach

Scores an enriched candidate export against your ICP and flags who to call first.

PROMPT TO COPY

Export enriched data from your sourcing tool to Drive first

Read the candidate CSV in **[folder]** in Drive. Score each profile against this profile: **[paste]**. Produce a priority outreach list: tier 1 first, a one-line rationale per person, and the gaps I should probe on a call. Flag anyone who looks like a false positive so I can check them by hand. Save as a new doc in the folder.

CONNECTIONS

Drive
Notion
Folder

SCHEDULER

Per campaign

05

MARKETING

Recruitment marketing assets

Turns a job spec into a LinkedIn post and a populated Canva design, held as drafts.

PROMPT TO COPY

Works from your existing Canva templates.

Read the job ad in the "**[Role] – [Client]**" folder. Write a LinkedIn post for the role: a hook that names the candidate's likely frustration, a two-line role summary, three concrete reasons to apply, and a call to action. Then open **[template name]** in Canva and populate the text fields. Save everything as drafts; nothing is exported or posted until I approve it.

CONNECTIONS

Canva

Drive

Gmail

SCHEDULER

Per role

06

COMMS

Candidate email drafter

Drafts first-touch, follow-up or decline emails built from your role brief so they're never generic.

PROMPT TO COPY

Read the role brief in the "[Role] – [Client]" folder. Draft a [first-touch / follow-up / decline] email to [candidate name], using the two selling points from the brief that best match their background. Under 80 words, plain language, no recruiter clichés. Save as a Gmail draft for my review.

CONNECTIONS

Gmail

Drive

Notion

SCHEDULER

Per candidate

07

TRIAGE

Inbound triage + call booking

Screens replies against your criteria and queues the right next message for every candidate.

PROMPT TO COPY

Read the "**[Role] – [Client]**" folder: job spec, FAQ and screening questions. Check my inbox for replies to the **[campaign]** outreach. For each reply, draft the right next step: screening questions if unanswered, a Calendly booking invitation for **[talent partner]** if they meet the criteria, or a warm decline if they do not. Never send anything. Leave each as a Gmail draft with a one-line reason, and summarise the batch in Notion for my morning review.

- *Spend a few minutes reviewing these each morning. It's crucial that every message out is still yours.*

CONNECTIONS

Gmail
Notion
Calendly

SCHEDULER

Run daily

08

SCREENING

Candidate shortlist brief

Reads every CV in the role folder and returns a ranked shortlist against the scorecard.

PROMPT TO COPY

Read every CV in the “**[Role] – [Client]**” folder and score each candidate against the scorecard. Produce a ranked shortlist: name, score, one-line rationale and a suggested interview order. Flag hard stops (visa, location, salary) separately, and where a CV is ambiguous, say so rather than marking the candidate down. Save to the role folder for my review.

CONNECTIONS

Drive

Notion

Folder

SCHEDULER

Per role

09

COORDINATION

Interview scheduling pack

Finds the availability, drafts the invite, and briefs your interviewer from the scorecard.

PROMPT TO COPY

Check my calendar for three available [30/60]-minute slots next week, avoiding [constraints]. Draft a scheduling email to [candidate] offering the slots. Then build an interviewer briefing from the scorecard in the "[Role] – [Client]" folder: what to assess, questions per dimension, and what a strong answer sounds like. Save the briefing to Notion and leave the email as a draft.

CONNECTIONS

Calendar

Gmail

Notion

SCHEDULER

Per interview

10

DEBRIEF

Post-interview debrief summary

Turns rough interviewer notes into a clear, structured and evidence-based debrief!

PROMPT TO COPY

Here are my notes from today's **[role]** interview: **[paste]**. Read the scorecard from the role folder and write a structured debrief: a score per dimension with the evidence behind it, strengths, risks, and a hire / no-hire recommendation with reasoning. Where my notes do not cover a dimension, mark it not assessed rather than inferring. Save to the role folder.

- *If you don't have the evidence, write "not assessed".*

CONNECTIONS

Notion

Drive

Folder

SCHEDULER

Post interview

11

OFFERS

Offer letter generator

Builds a personalised offer letter from your template and the candidate's details.

PROMPT TO COPY

Candidate: **[name]**. Role: **[title]**. Package: **[$ base + super + variable]**. Start date: **[date]**. Read the offer template in the **[client]** folder in Drive and generate a complete, personalised offer letter. List every number at the top for my confirmation before I send anything. Save to the role folder and leave as a Gmail draft.

CONNECTIONS

Drive

Gmail

Notion

SCHEDULER

Per offer

12

REPORTING

Weekly client pipeline update

Reads your tracker and drafts the client update, with blockers and next actions.

PROMPT TO COPY

Read my pipeline tracker for **[role]** in Drive. Write a client update: candidates in play and their stage, movement since last week, blockers, and recommended next actions with owners. Direct tone, no padding. Save to Notion and leave as a Gmail draft addressed to **[client contact]**.

CONNECTIONS

Drive

Notion

Gmail

SCHEDULER

Run weekly

13

COMMS

Slack hiring update

Posts a formatted weekly hiring update to your internal channel, after you approve it.

PROMPT TO COPY

Scheduled posts, not real-time triggers

Read the pipeline tracker for **[roles]** in Drive. Write a concise hiring update formatted for Slack: candidates in play, stage, week-on-week movement, with any role that needs urgent attention flagged at the top. Share it with me as a draft first; once I approve, post to **[#channel]**.

CONNECTIONS

Slack

Drive

Notion

SCHEDULER

Run weekly

14

PERFORMANCE

Recruiter activity dashboard

Turns weekly activity data into a team performance summary with one action per person.

PROMPT TO COPY

Read this week's activity data from **[spreadsheet]** and our benchmarks from Notion. Produce a team summary: output per recruiter, pipeline conversion by stage, RAG status against target, and one specific action per person. Flag any data that looks wrong or incomplete before drawing conclusions. Save to Notion for my review before it goes anywhere near the team.

- *This is the workflow recruitment teams outgrow first. If the spreadsheet becomes a bottleneck, see the back page ;)*

CONNECTIONS

Excel

Notion

Drive

SCHEDULER

Run weekly

AUTOMATE THE REPEATERS

Put it on a schedule

Five steps and the workflow runs on cadence, ready in your morning review queue.

1. **Open Cowork**
   In Claude, switch to Cowork mode.

2. **Connect your tools**
   Link the connectors the workflow needs. You can do this once per tool (not once per prompt).

3. **Paste and fill**
   Drop the prompt in and replace every **[bracket]** with your specifics. Vague brackets in means you'll get vague drafts out, but put the time in for this and you'll see the rewards.

4. **Type `/schedule`**
   Trigger the scheduler inline.

5. **Set the cadence and save**
   Choose the frequency. From here it'll automatically arrive.

Which ones to schedule

Daily: 07 Inbound triage. **Weekly:** 12 Client update, 13 Slack update, 14 Activity dashboard. **At role intake:** 01 Intake pack, 02 Pool sizing. The rest fire when you need them.

FROM NEOMA

When you want to level up from prompts

These workflows will genuinely give you back hours every week. What we see next, in almost every recruitment business we work with: the pipeline lives across spreadsheets, reporting is stitched together by hand, and somebody has built a homegrown dashboard on a local server that collapses or gets a bug the moment the whole team starts relying on it.

Neoma builds bespoke recruitment dashboards on secure, hosted infrastructure: pipeline forecasting, placement analytics, consultant trackers, ratio modelling and finance summaries, connected live to your CRM through its API. We have already built this for recruitment businesses, and we design against the CRMs recruiters actually use, including JobAdder, Bullhorn and Vincere.

Start with a scoping day

We spend a day on site with you: review what you already have, assess your CRM's API and your data security, and hand you a fixed cost and timeline. From there, commit to the full build or take it module by module.

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neoma.com.au · AI capability uplift and bespoke builds for recruitment businesses

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