



How LeverTRM Supports Rapidly Scaling Companies Like Loopio

54%

headcount growth
year-over-year

50+

new hires in
Q1 2022

CASE STUDY



“We do all of our hiring through LeverTRM. From account executives, sales development reps, data scientists, software developers, product designers, leadership hires, customer success managers, students — pretty much any position a growing SaaS organization needs, we fill with LeverTRM.”



Yeniffer Pang-Chung,

Senior Manager of Talent Experience, Loopio



Loopio

Loopio's software helps companies streamline their response process for RFPs, DDQs, and Security Questionnaires. Serving over 1,000 customers globally, Loopio is the leading, most-loved RFP response solution in the market.

Product

LeverTRM

Highlights

Challenges

- Choosing scalable software to support rapid growth
- Keeping candidate data secure and in one place
- Streamlining communication across all hiring teams

Solution

- LeverTRM is a complete and scalable ATS+CRM solution
- Gain a unified view of all hiring and recruiting activity
- Protect candidate data with ISO 27001 certification and SOC 2 compliance
- Gain real-time aggregate insight into hiring pipeline health with Visual Insights

Results

- 54% headcount growth year-over-year
- 50+ hires in Q1 2022
- 37 days average time to fill
- Standardized framework to advance DEI initiatives

Challenges

Building out a team to support rapid growth

Investing in people has always been at the heart of Loopio's mission. But maintaining a strong people focus during periods of rapid growth is a challenge — and Loopio, an [RFP software](#), was growing at a swift pace. Between 2017 and 2020, its [revenue skyrocketed 573 percent](#).

To empower their recruiting and hiring teams as they scale, Loopio adopted Lever's Talent Relationship Management platform (LeverTRM).

“We needed a smarter tool to enable the hiring efforts across all of our teams. We switched to LeverTRM because it scaled with our growth,” says Yeniffer Pang-Chung, Senior Manager of Talent Experience at Loopio.

Empowering hiring teams with scalable software

Before LeverTRM, the Talent Experience team relied on an alternate ATS to manage candidates. But Loopio's needs soon outpaced the platform's capabilities. The move to LeverTRM helped:

1. Provide structure to sourcing and referral processes by keeping all candidate data organized in one place.
2. Protect sensitive data at every stage of Loopio's hiring process.
3. Facilitate cross-team communication to improve Loopio's candidate experience and talent pipeline. All information is displayed in real time.

Most importantly, LeverTRM provides Loopio with a scalable and user-friendly solution to help build genuine relationships with each of its candidates.

“We don’t want candidates sitting in the application stage for too long. So the LeverTRM dashboard that showcases the candidates in each stage and all of the activity has quite a few benefits,” Yeniffer says.

Solution

Simplify recruiting and hiring workflows

LeverTRM enables recruitment teams to source, nurture, manage, and hire the best candidates at scale. Sourcing and talent teams also use LeverTRM to stay organized and expedite time to fill, even while juggling a huge volume of candidates.

“LeverTRM adds the most value to our recruiting function. Our recruiters are in there every single day — scheduling interviews, giving feedback, adding feedback, tracking every single step. You want a tool that’s intuitive, and I find that is the case with Lever and has consistently been the case with Lever,” Yeniffer says.

Key features including rich candidate profiles and dashboards, automated nurture capabilities, Fast Resume Review, DEI survey and dashboards, and a large [integrations ecosystem](#) (such as [LinkedIn Recruiter](#)) enable Yeniffer and her team to unify their entire hiring process.

“From a workflow perspective, the biggest benefit is being able to centralize all candidate activities in one system. We don’t have to leave the system to access things like resumes, interview notes, or even the job description. That’s so helpful because we don’t ever want to lose any information around our candidates, especially those active in our pipeline,” she says.

Focus on protecting sensitive candidate data

Loopio works to protect candidate confidentiality at every stage of the hiring process, but securing sensitive data becomes especially important when recruiting new people to their senior leadership team.

Loopio uses LeverTRM to enforce least-privilege access to seniority hire information. Only the senior leadership team and key members of the talent team can view that data.

The fact that [Lever has its ISO 27001 certification and is SOC 2 compliant](#) also gives Yeniffer peace of mind that candidate data is always protected.

“We were hiring 2 people to our senior leadership team. If their names or information leaked, we’d be doing a huge disservice to those candidates that trusted us enough to apply. LeverTRM has added a vital layer of protection to our process,” Yeniffer says.

Improve hiring practices with built-in analytics

Visual Insights — a built-in feature included in all LeverTRM packages — makes it easy to review, share, and export recruitment metrics. Sourcers, talent teams, and hiring managers gain at-a-glance insight into hiring pipeline health.

“What I appreciate about Visual Insights is that it gives us a real-time aggregate of all of our open roles and a snapshot of what’s happening with each of our teams,” Yeniffer says.

“Recruiters have an exact idea of what’s happening on their end of the pipeline, with their open requisitions. Hiring managers can go in and see exactly what activity is occurring across teams. Department leaders can see a zoomed-out view of all hiring activity,” she adds.

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“LeverTRM keeps us organized, and it’s super easy to add folks to the system. It enables collaboration across our teams, and that’s really powerful.”

Results

Attracting and retaining top talent

LeverTRM empowers the talent team to support Loopio’s rapid scaling with a steady influx of talented new hires. Headcount grew by 54% year-over-year and, in the first quarter of 2022, Loopio signed over 50 new employees.

“Our recruiters want to use LeverTRM. It has all the functionality they need for daily operations. It’s now embedded in our day-to-day workload,” Yeniffer says.

Yeniffer says that even in the midst of Loopio’s rapid growth, Lever has enabled her team to decrease their time to fill. Candidates in the pipeline never remain at any given stage of the process for more than a week.

The tools to build a strong company culture

Loopio takes strides to invest in its people. It publishes an [annual DEI report](#), detailing its commitment to diversity, the steps taken to improve company culture, and where the company is heading.

The report publicly acknowledges the desire to formalize growth frameworks, implement more DEI learning opportunities, and continue to improve the hiring experience.

LeverTRM enables those goals by making it easy to communicate, collaborate, and gain insight into hiring pipeline diversity.

“When I’m looking at DEI and the type of experience we want to provide and the people we want to attract, having consistent hiring frameworks in place is key. LeverTRM provides us with that structure,” Yeniffer says.

LeverTRM’s native analytics and diversity dashboards make it easy to spot areas that need improvement. This enables Loopio to continue pushing the envelope on its DEI initiatives.

“As a business, we’re constantly looking at the source of hires and how it intersects with our goals around representation. When we see that we’re not meeting our goals, it’s a call for us to start sourcing and partnering outwardly with organizations that are similarly committed to DEI. It tells us where we should be investing our money and that’s key,” Yeniffer says.

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“LeverTRM helps us ensure that every candidate receives the same process, facilitates blind feedback, and helps us root out biases from our process.”



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right candidates at scale.**

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