



# An Employee Referral Technology Evaluation Checklist

An evaluation template with criteria to assist you in choosing the right digital employee referral technology for your company.



# Introduction

The best employee referral programs will have many features that give you everything you require to bring in quality referrals from your employees. With almost a decade of experience implementing employee referral programs for over 1,000 companies globally, we have determined a number of critical success features that you should look for in employee referral technology. You will find these in this evaluation worksheet under the following five categories:

- Basic Requirements
- Rewards & User Engagement
- Integration to ATS & Application Workflows
- User Management
- Data Privacy & Compliance

On the following pages, we have created a template for each category that includes numerous features that should be provided in the employee referral program of your choice. Use this template to help you compare and decide on the right employee referral technology for your organization.



## Basic Requirements

| Customization  | Firstbird |  |  | Notes |
|--|-----------|--|--|-------|
| Account branding features to showcase your CI  | ✓         |  |  |       |
| Customize personal message templates and images for social network shares  | ✓         |  |  |       |
| Different job brandings are available depending on location or department  | ✓         |  |  |       |
| Customize your company description for shares on social networks   | ✓         |  |  |       |
| Include pictures or videos and other content to your job postings  | ✓         |  |  |       |
| Desktop Version  |           |  |  |       |
| Referrers can share jobs on all major social networks including WhatsApp   | ✓         |  |  |       |
| Referrers can make direct referrals  | ✓         |  |  |       |
| Referrers can see the status of their referral in their account  | ✓         |  |  |       |
| Users can customize their notifications (which events they will be informed about)   | ✓         |  |  |       |
| Referrers can apply themselves for positions   | ✓         |  |  |       |
| Referrers can provide feedback to candidates who applied through their share   | ✓         |  |  |       |
| Mobile App   |           |  |  |       |
| Referrers can share jobs on all major social networks incl. their preferred messaging providers (e.g. WhatsApp, Signal, Telegram, WeChat, etc) | ✓         |  |  |       |
| Referrers can make direct referrals  | ✓         |  |  |       |
| Referrers can see the status of their referral in their account  | ✓         |  |  |       |
| Users can customize their notifications (which events they will be informed about)   | ✓         |  |  |       |
| Referrers can apply themselves for positions   | ✓         |  |  |       |
| Referrers can provide feedback to candidates who applied through their share   | ✓         |  |  |       |
| Reporting  |           |  |  |       |
| There is a standardized reporting available for all recruiters   | ✓         |  |  |       |
| Customer receives a monthly export including all activities of the referrers   | ✓         |  |  |       |
| Customer receives a monthly export including all the referral and share performance of all active jobs   | ✓         |  |  |       |
| Customer receives a monthly export including all pending, due, and executed reward payments  | ✓         |  |  |       |

# Rewards & User Engagement

| Rewards and Engagement  | Firstbird |  |  | Notes |
|---|-----------|--|--|-------|
| Customer can set up multiple rewards and select a reward for each job   | ✓         |  |  |       |
| Rewards can be split into several payments (e.g. first installment after hiring, second installment after 6 months)   | ✓         |  |  |       |
| Customer can set up non-monetary rewards  | ✓         |  |  |       |
| Rewards Management  |           |  |  |       |
| Customer can accept or decline reward   | ✓         |  |  |       |
| Option for auto-approve rewards   | ✓         |  |  |       |
| Recruiters are notified when rewards are due for payout   | ✓         |  |  |       |
| Reward payments can be declined if they don't meet the customer reward policy (e.g. referrer is working in recruiting)  | ✓         |  |  |       |
| Talent Scout is informed of reward approvals  | ✓         |  |  |       |
| Customer can receive weekly or monthly reward payment reports for their compensation and benefits department  | ✓         |  |  |       |
| Referrer Engagement   |           |  |  |       |
| All of the following referral activities can be tracked and are shown to the referrer: Views of job shares, direct referrals, applications, interviews, hires | ✓         |  |  |       |
| Referrers receive points for their activities to gamify the referral process  | ✓         |  |  |       |
| A leaderboard based on the activity of referrers is available   | ✓         |  |  |       |
| Referrers are informed about the achievements of their colleagues   | ✓         |  |  |       |
| Reward Shop   |           |  |  |       |
| Customer can set up a dedicated reward shop in their referral account   | ✓         |  |  |       |
| Referrers can earn points for all activities and redeem these points in the reward shop   | ✓         |  |  |       |
| Items in the reward shop can get limited  | ✓         |  |  |       |
| Customer can set up points for the reward shop as referral bonus instead of monetary rewards  | ✓         |  |  |       |
| Certain rewards can be exclusive for users with a certain level of activity   | ✓         |  |  |       |
| Fraud Prevention  |           |  |  |       |
| The referral program can prevent fraudulent collection of points on fake shares and views   | ✓         |  |  |       |
| The referral program can prevent spam or fraudulent collection of points on fake applications   | ✓         |  |  |       |

## Integration to ATS & Application Workflows

| Integration to ATS & Application Workflows   | Firstbird |  |  | Notes |
|--|-----------|--|--|-------|
| Candidates are forwarded from the referral program to the customer career website to see the job requirement and to finalize their application   | ✓         |  |  |       |
| Candidates who applied via a share or direct referral can be traced back to the referral program. Measurements of all referral activities as stated in 2 are guaranteed and the user engagement requirements as stated in point 2 are not affected | ✓         |  |  |       |

## User Management

| Authentication  | Firstbird |  |  | Notes |
|---|-----------|--|--|-------|
| Multi-factor authentication is available to all users and can be enforced for selected roles  | ✓         |  |  |       |
| Single-sign-on is available for all users   | ✓         |  |  |       |
| Customer can enforce SSO and disable login via email and password   | ✓         |  |  |       |
| New employees are automatically added to Firstbird through SSO just-in-time provisioning  | ✓         |  |  |       |
| Password Policies can be customized to the needs of the organization. This includes e.g. the characteristics of the password (lengths and number of special characters and numbers) | ✓         |  |  |       |
| Customer can set-up a customizable registration page for employees to register to the referral program. The registration can be limited to the organization's email domains         | ✓         |  |  |       |
| User Management   |           |  |  |       |
| Users can be managed by the Administrator in the account including all the following activities: deactivate, delete, change role, change department, change location                | ✓         |  |  |       |



# Data Privacy & Compliance

| Data Privacy & Compliance  | Firstbird |  | Notes |
|--|-----------|--|-------|
| Referrals that have finalized the recruitment process are automatically deleted after a customizable time-span   | ✓         |  |       |
| Candidates who were referred by a Talent Scout but did not actively apply get deleted after 30 days  | ✓         |  |       |
| All users can delete their account themselves  | ✓         |  |       |
| When users delete their account, all personal data is deleted. Statistics remain but cannot be traced back to the individual                             | ✓         |  |       |
| Users can set themselves incognito in the registration process, making themselves invisible in the program to other referrers (e.g. in the leader-board) | ✓         |  |       |
| Data privacy regulations can be customized   | ✓         |  |       |
| Check boxes for user registration forms and application forms can be customized  | ✓         |  |       |

## Further Resources

Are you interested in knowing more when it comes to buying employee referral technology for your company? You might find our complete Buyer's Guide to Employee Referral Programs helpful, as it includes:

- What to look for in an employee referral program
- How to think about and create a budget
- An overview of key features to consider when making your decision
- Questions to ask a vendor
- and more!

[DOWNLOAD BUYER'S GUIDE](#)





Firstbird is the global leader in employee referral programs. We combine our state-of-the-art technology with our expertise to bring global corporations and their employee referral programs to new heights.

To learn more, visit  
[firstbird.com/en](https://firstbird.com/en)

[hello@firstbird.com](mailto:hello@firstbird.com)