



Diag Partners organizes recruitment and simplifies the sales process.

Boutique recruiting organization graduated from spreadsheets with its move to Copper

50,000

People records inside Copper

105+

job openings tracked at a time

4 years

using Copper

Meet Diag Partners: Boutique recruiting firm

Founded a decade ago by brothers Joe and Carl Saad, the Michigan-based boutique recruiting organization, Diag Partners, specializes in staffing, recruiting and consulting. Technology agnostic and completely unreliant on job posting sites, they take pride in servicing a wide range of industries and companies.

The firm named themselves in homage to the founders' alma mater — many initial members attended the University of Michigan, with a campus center called "the Diag." While a few Michigan State fans also make up the mix, the company's team members are mainly die-hard U of M folk (Go Wolverines!).

What's football got to do with it? Well, a lot, because company culture is central to Diag Partners' success. Diag's core values center around their employees' happiness, and that emphasis on positive culture serves as the company's guiding force. Keeping their employees happy was one of the factors that spurred their CRM search in early 2018 as they tried to eliminate busy work their staff would rather not be bothered with.

We sat down with Diag's co-founder and Operations Partner, Carl Saad, to chat about how they've used Copper to simplify their employees' lives, streamline organization and ultimately, better serve their clients.

The details matter in recruiting

Recruiting involves a lot of information sharing. The sales team needs to share information with the recruiting team, who has to share information with the account managers. Numerous calls, notes and emails are generated at each stage in the recruiting journey, making it all too easy for information to fall through the cracks.

When Diag Partners started looking for a CRM, their internal communications felt a lot like playing telephone: Information passed from department to department with important details left out along the way.

Most recruiting firms use an applicant tracking system (ATS) to keep their applicants organized. With the ability to integrate with job posting sites, an ATS makes sense. But Diag Partners doesn't rely on job posts to recruit candidates — a unique differentiator that enables them to source talent more selectively — so an ATS built with this functionality wasn't something they needed, or wanted. Instead, they opted for a CRM offering more comprehensive features to organize their entire company. And Gmail integration was a must-have. (Note that, for recruiting companies that use ATS, Copper integrates with many applicant tracking systems using Zapier).



“We’re a Google organization through and through,” explains Carl — they use the Google Workspace suite daily to organize and activate their business. So, initially, they tried the (now retired) Google Hire platform. But, once they got into it, they quickly realized Google Hire was geared towards internal hiring processes and didn't have the robust features they needed. Plus, it lacked any sort of granular customization.

They found themselves back on the hunt. Diag needed a CRM that could integrate with their Google suite, allow customization, and organize their process from top to bottom. And that wasn't all they were looking for.

Carl also knew he needed a CRM that would minimize data entry for their team because, like most sales-oriented organizations, their staff didn't enjoy the hindrance of manually keying in information.

Eliminating a lot of the manual data entry would simplify the process for the team while increasing data integrity — a win-win.

When Carl came across Copper, a Google-recommended CRM that also offers customization and automation to reduce manually entering data, he knew they could stop their search. “Since I’m the primary administrator, it doesn't require our users to do a lot of data entry — plus the data integrity is really good.”

Using Copper to customize, streamline, and simplify

Carl didn't waste any time getting started. He jumped straight into customization to make Copper work for them. "I went a little nuts on my customized fields," Carl said, "But it was pretty fun, frankly, because I finally found a system I could use."

Diag needed Copper to manage three different pools of people: their potential clients, current clients and job candidates.

Carl's team started by creating a pipeline to mimic a REQ wall, aka a place to see all the open positions easily. On average, Diag Partners has between 85-105 or more job openings (Opportunities) at any given time, so it was important to have a central place where that information was easily visible.

They also created two additional pipelines, one for the HR team and one for Upcoming Requirements. The Upcoming Requirements pipeline was built to help simplify the onboarding process for the sales team. And they went all in on the automations for this third pipeline.

Putting automations to work for the sales team

In the Upcoming Requirements pipeline, sales team members can quickly build out requirements for a particular role (like pay, start date, location, criteria, why the position is open, competition) while they're on the phone with a potential client. Carl developed a detailed, custom form to build out the records in this pipeline. The idea was to create a streamlined roadmap for the sales team to follow when gathering details about a new role.

This way, account managers have immediate access to all the pertinent information, and it's accurate and accessible for anyone who needs it along the way (like recruiters).

But the customization didn't stop there. Carl further automated this pipeline using Zapier to issue a push notification and create a new task anytime a new role is created in the Upcoming Requirements pipeline.

Thanks to customizations, Carl developed a system that works specifically for Diag. For example, he created a custom field that allows them to easily track candidates who aren't hired the first time around and resubmit them to similar positions in the future. "It's important for us to have an organizational system to keep an eye on candidates submitted to an opening, so if they don't get it, we can easily stay in touch with them."



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Carl Saad
Diag Partners Co-Founder



On top of customization, the team also appreciates the ability to track emails using Copper's Gmail integration that automatically updates CRM data based on new emails that come in. With Copper, Diag has organized and streamlined their entire process while virtually eliminating tedious manual entry for their team.

Achieving the unachievable: an organized staffing company

Today, Diag employees are distributed in satellite offices across California, Ohio and Michigan, and they use Copper as their primary source of information. Currently, they manage around 50,000 People records inside their Copper account, and it's growing every day.

The firm uses their REQ wall pipeline to keep the entire recruitment process organized. On top of that, with Copper they've been able to:

- Generate reports and forecast timelines and earnings against previous performance to keep things accurate
- Keep track of individual candidates with a customized field so they can search for applicants based on position type in the future
- Streamline the information-gathering process for the sales team using a customized form and automations through Zapier
- Graduate from spreadsheets (finally)

While recruiting is never an exact science, Carl and his team have been able to use Copper's Reports to better understand their trends and predict future outcomes. Plus, now talented candidates that go unhired on the first submission don't get lost in the crowd.

Diag has managed to achieve everything they set out to accomplish with Copper — and Carl says that's quite an accomplishment. "For a midsize staffing company to be able to stay organized like this, that's a KPI in itself. Most staffing companies are using Excel or some sort of spreadsheet."

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Evolving to the new norm with Copper

Diag plans to continue using Copper as they move forward into a post-COVID world. They're already leveraging their historical data to navigate the ever-evolving workforce, which has been especially helpful as their employee base has become more geographically distributed, helping keep all data centralized and constantly synced.

Eventually, they plan to use Copper to search historical, pre-COVID recruitment data to predict future trends better. While the employment trends continue to ebb and flow with the times, Diag feels confident that thanks to the organization they've achieved with Copper, they'll be prepared to ride the waves.

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Free your recruitment process from bulky spreadsheets

Despite the industry status quo, recruiting firms and staffing agencies don't need to rely on spreadsheets for managing relationships with candidates and clients. As Diag Partners discovered, there is a better, easier way.

Designed for people who want to build human-centered businesses, Copper functions seamlessly in the background while you spend time on what matters: people. It is the intuitive, sophisticated and easy-to-use CRM that your team will love.