

The ATS AI-Readiness Scorecard

for executive search firms

A 100-point score, five operational diagnoses, a five-record test, and a 30-day improvement plan.

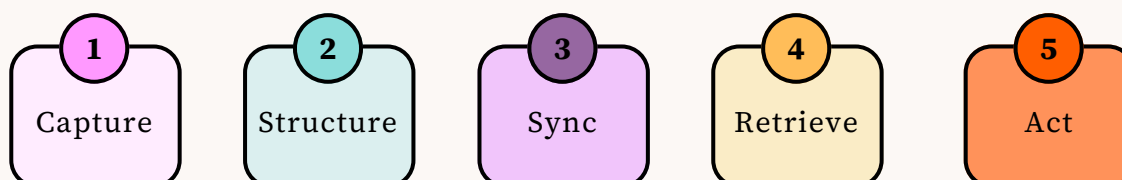
AI can only use what it can find in your system. Every call, note, and update your team logs should end up as real, usable memory in your ATS.

This scorecard checks whether your ATS is in good enough shape for AI to be useful on top of it

Your ATS is not healthy because people log in

When the ATS is weak	When the ATS is healthy
AI summarizes a call, but somebody still has to decide where the context belongs.	Structured data flows straight to the right candidate, client, and search records
Old stages, duplicate records, and missing owners make automation unreliable	Clean stages and clear ownership let routine updates run on their own
Relationship history stays locked in individual memory and private notes	Past conversations and commitments are usable for prep, handoffs, and follow-through
Leaders can't tell a workflow problem from an activity problem	Bottlenecks and delays become visible and measurable, not guesswork

How to run the audit



Capture the conversation → structure the useful context → sync it to the right records → retrieve it when needed → support a reviewed next action.

The ATS Quick Scorecard

A 10-minute diagnostic for executive search firms to help see if another person understands a live search and takes the next action—using only what is in your ATS.



The scoring scale

Score	What it means
0: Absent	No agreed practice; the evidence is missing.
1: Ad hoc	A few individuals do it, but it depends on memory or personal effort.
2: Partial	This practice exists, but coverage or quality is inconsistent.
3: Standard	This practice is defined, usually followed, and reviewable.
4: Controlled	The practice is measured and maintained; automation reduces effort without removing human accountability.

Record Integrity

Can the firm trust the record?

Evidence to verify in the ATS/CRM	Score
Candidate and contact identities are stable; obvious duplicates are prevented or resolved.	☐ ☐ ☐ ☐ ☐ 0 1 2 3 4
Current employer, title, contact details, relationship owner, and relevant required fields are populated.	☐ ☐ ☐ ☐ ☐ 0 1 2 3 4
Material facts show a source and date; recruiter assessments are distinguishable from facts.	☐ ☐ ☐ ☐ ☐ 0 1 2 3 4

Subtotal: ____/12

Live workflow Control

Evidence to verify in the ATS/CRM

Evidence to verify in the ATS/CRM	Score
Every live search and active candidate process has a current stage and named owner.	☐ ☐ ☐ ☐ ☐ 0 1 2 3 4
Every live process has an unambiguous next action and date; overdue actions can be surfaced.	☐ ☐ ☐ ☐ ☐ 0 1 2 3 4
Stage definitions are consistent, and paused, lost, or completed work is closed with a reason	☐ ☐ ☐ ☐ ☐ 0 1 2 3 4

Subtotal: ____/12

Searchable Context

Can someone retrieve the reason?

Evidence to verify in the ATS/CRM	Score
Candidate conversations preserve motivation, constraints, evidence, concerns, timing, and next steps where relevant.	☐ ☐ ☐ ☐ ☐ 0 1 2 3 4
Client conversations and briefs preserve outcomes, stakeholders, trade-offs, commitments, risks, and process.	☐ ☐ ☐ ☐ ☐ 0 1 2 3 4
Useful context is structured consistently and linked to the correct candidate, client, contact, and search records	☐ ☐ ☐ ☐ ☐ 0 1 2 3 4

Subtotal: ____/12

Institutional Memory

Does relationship intelligence survive the individual?

Evidence to verify in the ATS/CRM	Score
A colleague can find the chronology of meaningful contact across calls, email, video, and in-person conversations.	☐ ☐ ☐ ☐ ☐ 0 1 2 3 4
Prior approaches, outcomes, objections, and reasons for non-progression can be found and interpreted later.	☐ ☐ ☐ ☐ ☐ 0 1 2 3 4
Partner, researcher, associate, and operations handoffs have a defined minimum context and clear accountability.	☐ ☐ ☐ ☐ ☐ 0 1 2 3 4

Subtotal: ____/12

Automation and AI readiness

Can the firm use software to do tasks without making things more confusing?

Evidence to verify in the ATS/CRM	Score
High-frequency workflows have an agreed capture standard before automation is introduced.	☐ ☐ ☐ ☐ ☐ 0 1 2 3 4
Structured outputs reach the correct ATS records and fields; humans review consequential updates.	☐ ☐ ☐ ☐ ☐ 0 1 2 3 4
Privacy, correction, access, exception rules, and one measurable operational outcome are defined	☐ ☐ ☐ ☐ ☐ 0 1 2 3 4

Subtotal: ____/12

The Proof Test

Ask someone who does not own the records to review one live search, two active candidates, one client contact, and one prospect. Using only the ATS, can they answer:

Question	Clear	Partial	Missing
What is happening now, and what changed in the last meaningful conversation?	☐	☐	☐
What evidence or context explains the current view?	☐	☐	☐
What has been promised, who owns the next action, and by when?	☐	☐	☐
What is sensitive, uncertain, historical, or still needs verification?	☐	☐	☐

Add the 5 subtotals

Evidence to verify in the ATS/CRM	Score	Rank
Record Integrity	___/12	___
Live workflow control	___/12	___
Searchable context	___/12	___
Institutional memory	___/12	___
Automation and AI readiness	___/12	___
Total ATS score	___/60	___

Interpret Your Score

Score range	What your total suggests
0-39	Personal memory system: This ATS stores records, but important context and control still depend on individuals. Stabilize definitions, ownership, and minimum evidence before adding automation.
40-59	Patchy system of record: Useful pockets exist, but another person cannot reliably continue the work. Focus on the lowest dimension and remove one recurring break in capture or handoff
60-79	Operational system of record: This ATS supports most live work. The opportunity is consistency: exception reporting, cleaner handoffs, faster updates, and better use across the firm
80-100	Compounding firm intelligence: This ATS is broadly trusted, searchable, and controlled. Protect quality as you automate; measure business outcomes and audit exceptions rather than assuming maturity is permanent.

Action items for the next 30 days

Score range	Priority	Action items
0-39	Stabilize the system	Define what counts as live. Assign owners. Resolve duplicate identities. Agree the minimum fields and context required to continue a search.
40-59	Standardize capture	Choose one frequent conversation type. Define the useful output, correct ATS destination, next-action rule, and weekly exception review.
60-79	Improve continuity	Measure update latency and handoff success. Repair inconsistent stages, missing commitments, private notes, and context linked to the wrong records.
80-100	Automate with controls	Pilot one bounded workflow. Set human review, privacy and correction rules, an exception path, and one measurable operational outcome.