

◆ OPEN-SOURCE AI PLAYBOOK · FOR OPS, FINANCE AND HR

Candidate Shortlist System

Hundreds of applications per role get skimmed in seconds each, and good people slip through.

THE SYSTEM

Scores every application against the role's scorecard and hands the recruiter a ranked shortlist with reasons.

🕒 BUILD TIME

1-2 weeks

🛠️ HOW IT'S BUILT

Low-code

🔌 WORKS WITH

Greenhouse or Lever
or Google Workspace
or Microsoft 365

👤 OWNER

Head of talent or the
recruiting lead

How it works: from every application to a shortlist a person chose

THE FUNNEL · SAMPLE ROLE, FICTIONAL COMPANY

412 applications in

412 scored against the scorecard

41 strong 118 possible 253 low
ranked into three bands

recruiter reviews every band

18
on the shortlist

🔮 System reads and ranks 👤 Recruiter reviews and decides

🔒 **Removed before scoring:** Name · Photo · Age and birth date ·
Graduation years · Home address. Protected characteristics are never
used or inferred.

**THE SCORECARD · SENIOR CUSTOMER SUCCESS
MANAGER**

Renewals 30%

Has owned renewals for a book of B2B software accounts

Onboarding 20%

Has run onboarding for accounts with many users or sites

Product data 20%

Uses product usage data to spot accounts at risk

Working across teams 15%

Works with sales and product on expansions and feedback

Written communication 15%

Clear, specific answers to the application questions

Scores: 4 Clear evidence, with a result · 3 Clear evidence · 2
Some evidence · 1 Mentioned, no detail · 0 Not in the
application

One applicant, scored with the evidence quoted

Applicant 0147
Senior Customer Success Manager
Name, photo, age and address hidden from scoring
79 of 100 · Strong match

Renewals 30%	“Owned renewals for 62 mid-market accounts and kept gross retention at 94% in 2025.”	● ● ● ●
Onboarding 20%	“Led onboarding for a 1,200-seat hospital group across 9 sites.”	● ● ● ●
Product data 20%	“Built a health-score sheet from usage exports that flagged 11 at-risk accounts a quarter early.”	● ● ● ●
Working across teams 15%	“Worked with AEs on expansion calls.”	● ● ● ●
Written communication 15%	“I’d start by meeting the ten accounts that renew before March, before I change anything.”	● ● ● ●

Ask in the screen call: How did you work with product on feature requests? Ask for one example with a result.

Recruiter’s decision: shortlist, hold or not for this role. Only a person chooses.

Sample applicant and role, fictional company. Scores run 0–4 per criterion and are weighted by the scorecard.

Can we build it? FOR YOUR TECH LEAD

Tools you’ll use

Applications	Greenhouse or Lever (via their APIs)	or Ashby, Workable
Hiding personal details	A redaction step in the workflow	or Microsoft Presidio (open source)
Scoring against the scorecard	Claude (API)	or ChatGPT, Gemini
Running the steps	n8n	or Make, Zapier
Review and decision log	Notes in the ATS, plus a log of every score and decision	or Google Sheets or Excel

Three ways to build it

Start simple 1-2 days
 The scorecard as a saved prompt in your approved AI workspace. The recruiter pastes in applications with personal details removed.

Production 1-2 weeks
 n8n pulls new applications, removes personal details, scores each one and writes the scores and quotes back to the ATS as notes.

Custom 3-5 weeks
 Adds a review screen, checks scores against past interview panels and builds the reports your bias audit needs.

Access it needs

- ◆ Read access to applications, through a limited API key
- ◆ Write access to ATS notes only: never stages, rejections or emails
- ◆ An AI model account that doesn’t train on your data

Guardrails

- ◆ It never rejects or contacts anyone; a recruiter makes every decision
- ◆ A recruiter reviews every application it ranks low
- ◆ Job-related criteria only; personal details hidden, protected characteristics never used or inferred
- ◆ Every score, quote and decision is logged
- ◆ Checked against local hiring law, such as NYC’s rules on automated hiring tools, and audited for bias

What to measure

- ◆ Time from application to a first proper read
- ◆ Low-ranked applications the recruiter moves up
- ◆ Shortlisted people who pass the first interview
- ◆ Selection rates across groups, in each bias audit

Who builds and runs it

A recruiter or talent lead who owns the scorecards, an engineer for the ATS connection and redaction step in weeks 1-2, and HR or legal to sign off the law check and audit plan. After that, the recruiter writes each role’s scorecard with the hiring manager.



◆ FREE, OPEN SOURCE, NO SIGN-UP

20 AI systems every company should *build first.*

This playbook is one of 20. Each one solves a problem almost every company has, and shows how the system works, the tools it runs on, how long it takes to build and where a person signs off. Read them all, download any of them, and send them to your team.

[See all 20 playbooks →](#)

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FOR OPS, FINANCE AND HR

16 Sales-to-Delivery Handoff
17 Invoice & Collections Chaser
18 Candidate Shortlist System
19 Contract Risk Review
20 New-Hire Onboarding

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We'll build your first AI systems with your team.

In a free 30-minute call with our founder, we'll look at your tools and your week, and pick the playbooks that would save you the most time first.



Pallav Kaushish

Co-Founder, AIXGrowth

Free 30-minute call · No commitment

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