Reporting.Work | Case Study

Automating Bullhorn Placement Data for Executive Visibility

🎯 Client Problem

A large-sized staffing firm using Bullhorn was manually pulling placement data from their CRM every morning to update executives on new hires, start dates, and client activity.

This task:
- Took 1–2 hours/day of operations time
- Was prone to errors and missed updates
- Left C-level executives in the dark on day-to-day progress

🛠️ Our Solution

We built an automated pipeline that extracted, processed, and emailed key Bullhorn placement data to executives every evening - without human involvement.

Key Components:
- Bullhorn Data Mirror (SQL) to query recent placements
- ETL script (Node.js) to display placements for the past 24 hours
    - Start date (past 24 hours)
    - Client name, sales rep/recruiter, job title, department
- Email automation using SendGrid API (formatted HTML email)
- Hosted via daily scheduled Windows task

📫 Email Format Delivered Daily

Subject: Daily Placement Activity – [Today's Date]
Body:
- Separate tables for temporary, permanent and temp-to-perm conversions
- Columns for candidate, client, start date and commission allocations

📈 Results

- Saved 10 hours/week of manual reporting
- Executives gained real-time visibility without logging into Bullhorn
- Replaced static reports with actionable insights
- Ran daily without downtime or human intervention

🧠 Why This Worked

- Reused existing Bullhorn Data Mirror — no new licensing
- No dependency on IT or plugins

- Built once, scaled instantly
- Non-technical users got value via email, not dashboards

Want a similar automation?
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