THE STAFFING MACHINE

SYSTEMS WITH NOTION



Build a staffing business around automation and solid systems to scale your staffing business to the next level!

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Table of Contents

Chapter 1: Setting up a Staffing Agency Dashboard in Notion

Chapter 2: Using Databases to Track Candidates, Clients & Job Openings

Chapter 3: Creating a System for Scheduling and Coordinating Staff

Chapter 4: Managing Financial and Billing Information

Chapter 5: Utilizing Notion for Project Management and Collaboration

Chapter 6: Using Notion for Onboarding and Training New Staff

Chapter 7: Implementing a Performance Tracking and Review System

Chapter 8: Using Notion for Recruiting and Sourcing Candidates

Chapter 9: Creating a Knowledge Base and Resource Library

Chapter 10: Customizing Notion to Fit Your Staffing Agency's Needs

Chapter 11: Notion AI and Its Benefits for Staffing Agencies ★ NEW

Chapter 12: Integrating Wix with Your Staffing Agency Operations ★ NEW

CHAPTER 2

Using Databases to Track Candidates, Clients & Job Openings

One of the most powerful features of Notion is the ability to create custom databases for organizing and tracking information. In a staffing agency, databases can be used to keep track of candidates, clients, and job openings, among other things.

The real power of Notion databases lies in **Relations** and **Rollups** — linking your Candidates to Job Openings, Job Openings to Clients, and rolling up counts and statuses for instant visibility.

By structuring your databases correctly from the start, you create a foundation that scales as your agency grows — from 10 candidates to 1,000.

■ **Key Notion Features**

- Candidates ↔ Job Openings: two-way Relation for pipeline tracking
- Job Openings ↔ Clients: link every opening to its client record
- Rollups: count open jobs per client, candidates per opening
- Board view (Kanban) for visual pipeline management
- Gallery view for resume previews
- Calendar view for Posted Date and Close Date tracking
- Candidate lifecycle: New → Contacted → Available → Interviewing → Placed
- Regular data hygiene: prune unused fields and stale records

■ **Pro Tip:** Always build your Candidates, Job Openings, and Clients as separate databases before connecting them with Relations. This gives you maximum flexibility as your needs evolve.

CHAPTER 3

Creating a System for Scheduling and Coordinating Staff

As a staffing agency, it is important to have a system in place for scheduling and coordinating your staff. Notion can help you create a flexible and efficient system for managing your team's schedules.

Use a dedicated Schedules database linked to your Candidates and Job Openings databases. With Calendar and Timeline views, your whole team can see who is working where, when — at a glance.

In addition to scheduling shifts, use Notion's task management and comment features to coordinate communication within your team, ensuring everyone stays aligned without relying on separate messaging apps.

■ Key Notion Features

- Schedules database — Date, Time, Role, Location, Pay Rate, Staff, Status
- Calendar view for daily and weekly shift visualization
- Timeline view for longer-term assignments
- Color-coding by shift type or staff member
- Filters: Today's Shifts, This Week, Upcoming, Unfilled
- Tasks database linked to schedules for coordination
- Comments and @mentions for shift updates and changes
- Templates for common recurring shift types

■ **Pro Tip:** Create a 'Today' filtered view on your dashboard showing only today's scheduled shifts. Your team can check in each morning and know exactly what's happening without digging through the full database.

CHAPTER 4

Managing Financial and Billing Information

In a staffing agency, it is important to keep track of financial and billing information to ensure you are fairly compensated for your work. Notion can help you manage invoices, payments, and expenses in one organized place.

Create a dedicated Invoices database to track what you've billed, to whom, and the payment status. Link invoices to your Clients database so every financial record connects back to the relationship it came from.

By using Notion to manage financial and billing information, you can ensure that you are accurately tracking income and expenses, and that you have clear visibility into your agency's financial health.

■ Key Notion Features

- Invoices database — Client, Amount, Invoice Date, Due Date, Status
- Payments database linked to Invoices with received date and method
- Expenses database — Category, Amount, Date, Vendor, Notes
- Filters: Unpaid Invoices, Overdue, This Month's Expenses
- Rollup formulas for monthly and quarterly financial summaries
- Budget tracking with running totals and variance views
- Invoice templates pre-filled with client information
- Export-ready table views for accountant review

■ **Pro Tip:** Connect your Invoices database to your Clients database using a Relation. Then add a Rollup on each Client record to see total billed, total paid, and outstanding balance at a glance.

CHAPTER 5

Utilizing Notion for Project Management and Collaboration

In a staffing agency, it is often necessary to manage multiple projects and tasks simultaneously. Notion can help you stay organized and on top of your workload by providing tools for project management and collaboration.

Create a Projects database to track every initiative — from client campaigns to internal improvements. Link projects to tasks, team members, and deadlines so nothing falls through the cracks.

By using Notion for project management and collaboration, you can ensure that your staffing agency is efficient and productive, and that all team members are aligned and accountable.

■ Key Notion Features

- Projects database — Name, Client, Deadline, Status, Assigned Team
- Tasks database linked to Projects with priority and assignee
- Board view (Kanban) for visual status: To Do / In Progress / Done
- Timeline view for project scheduling and deadline management
- Comments and @mentions for team communication on tasks
- Recurring task templates for repeating workflows
- Shared project pages for client-facing collaboration
- Weekly project digest view for stand-up meetings

■ **Pro Tip:** Use Notion's Board view grouped by Project Status for your weekly team stand-up. It gives everyone a live, visual snapshot of what's in progress, what's blocked, and what's done.

CHAPTER 6

Using Notion for Onboarding and Training New Staff

As a staffing agency, it is important to have a system in place for onboarding and training new staff members. Notion can help you create a streamlined and efficient process for introducing new team members to your agency.

Build a centralized Onboarding Hub that new hires can access from day one — containing everything they need: company policies, role-specific resources, training schedules, and their personal onboarding checklist.

By using Notion for onboarding and training, you can ensure that new staff members are fully integrated into your agency and ready to hit the ground running from their very first day.

■ Key Notion Features

- Onboarding Hub page — policies, procedures, and key resources
- New Employee Checklist template with role-specific sequential tasks
- Training database — Topic, Format, Duration, Assigned To, Completion
- Calendar view for scheduling training sessions and check-ins
- Onboarding progress tracker linked to each new hire
- Resource library organized by department and role
- 30/60/90 day goal templates for new team members
- Manager guide page for consistent onboarding delivery

■ **Pro Tip:** Duplicate your New Employee Checklist template for each new hire and assign it to their manager. Both the new employee and manager can track progress in real time, and nothing gets missed.

CHAPTER 7

Implementing a Performance Tracking and Review System

In order to ensure that your staffing agency is running smoothly and meeting its goals, it is important to have a system in place for tracking and reviewing the performance of your team.

Create a Staff Performance database that stores each team member's goals, review history, feedback, and key metrics — all in one place. Link this database to your Tasks database to track completion rates and productivity.

By using Notion to track and review the performance of your staff, you can ensure that your agency is meeting its goals and that your team is consistently developing and improving.

■ Key Notion Features

- Staff Performance database — Name, Role, Review Cycle, Last Review, Rating
- Goal-tracking database linked to staff members and review periods
- Performance Review template with structured evaluation sections
- Calendar view for scheduling quarterly review meetings
- Feedback log with timestamped manager and peer entries
- Progress tracking using rollups from Tasks database
- Development Plan page linked to each staff record
- Anonymous feedback collection via shared Notion forms

■ **Pro Tip:** Schedule performance reviews using a recurring calendar event in Notion, linked to each staff member's performance page. This ensures reviews happen consistently and all feedback is stored centrally.

CHAPTER 8

Using Notion for Recruiting and Sourcing Candidates

As a staffing agency, it is important to have a system in place for recruiting and sourcing new candidates to fill job openings. Notion can help you streamline and organize your recruitment process.

Build a dedicated Candidate Pipeline using Notion's database features — tracking every candidate from initial contact through placement. Link your pipeline directly to Job Openings so your recruitment efforts map clearly to client needs.

By using Notion for recruiting and sourcing, you can ensure that you are efficiently and effectively filling job openings with the best possible candidates, while keeping every stakeholder informed.

■ Key Notion Features

- Candidate Pipeline — stages: Sourced, Applied, Screened, Interviewed, Offered, Hired
- Board view (Kanban) for visual pipeline management
- Source tracking — referral, job board, social media, direct outreach
- Interview Notes template with structured evaluation rubric
- Job Openings linked to Candidates via Relations
- Automated filters: Available Now, In Interview Stage, Recently Placed
- Recruitment metrics — time-to-fill, conversion rate, source quality
- Candidate communication log via page comments and @mentions

■ **Pro Tip:** Add a Source tracking field to your Candidates database and review it monthly. Knowing which channels (referrals, job boards, social) produce your best candidates helps you invest your recruiting time wisely.

CHAPTER 9

Creating a Knowledge Base and Resource Library

In a staffing agency, it is often helpful to have a central repository of information and resources that can be accessed by all team members. Notion can help you create a knowledge base or resource library to store and organize important institutional knowledge.

A well-structured knowledge base reduces repeated questions, speeds up onboarding, and ensures that your best practices don't disappear when team members change. It becomes the single source of truth for how your agency operates.

By creating a knowledge base in Notion, you can ensure that your staffing agency has a central repository of information that is easily accessible, consistently maintained, and continuously improving.

■ Key Notion Features

- Knowledge Base Hub — central access point for all resources
- Categories — Company Policies, Procedures, Best Practices, Templates
- Tag system for cross-referencing topics across categories
- Search and filter for quick retrieval by any team member
- Version history to track updates and changes over time
- Contributor permissions — who can edit vs. view-only access
- Linked articles connecting knowledge to related processes
- Quarterly review cadence to keep content accurate and current

■ **Pro Tip:** Assign a 'Knowledge Base Owner' for each major category. This person is responsible for keeping their section accurate and up to date — distributing ownership means your knowledge base stays alive.

CHAPTER 10

Customizing Notion to Fit Your Staffing Agency's Needs

One of the key benefits of using Notion in a staffing agency is the ability to customize it to meet the specific needs of your business. Notion provides a range of tools and options that can be tailored to your unique workflows and goals.

From custom templates and database properties to third-party integrations with CRM systems, accounting software, and communication tools — Notion can be the connective tissue that ties your entire operation together.

By customizing Notion for your staffing agency, you can create a powerful tool that helps you stay organized, efficient, and productive, and that adapts as your business grows and evolves.

■ **Key Notion Features**

- Custom templates for job openings, candidate intake, client onboarding
- Third-party integrations — CRM, accounting, communication platforms
- Wix integration — connect your website and client portal to Notion
- Zapier or Make (Integromat) automation for repetitive workflows
- Custom views per team role — recruiter, operations, finance
- Notion API for advanced customization and data sync
- Permission levels — admin, editor, commenter, viewer
- Mobile app optimization for field staff and on-the-go access

■ **Pro Tip:** Before adding integrations, map out your ideal workflow on paper first. Knowing exactly what data needs to flow where will save you hours of trial-and-error when configuring automations.

CHAPTER 11 ★NEW

Notion AI and Its Benefits for Staffing Agencies

Notion AI is an integrated artificial intelligence layer built directly into the Notion workspace — and for staffing agencies, it is a genuine game-changer. Rather than switching between your workspace and a separate AI tool, Notion AI lets you generate, summarize, edit, and analyze content right where your data already lives.

From drafting job descriptions in seconds to summarizing a candidate's interview notes, Notion AI removes the friction between thinking and doing. It amplifies every member of your team — whether they are a recruiter sourcing candidates, an operations manager tracking shifts, or a business owner reviewing performance — making each person measurably more productive.

This chapter explores the core capabilities of Notion AI and shows you exactly how to apply them to your staffing agency's day-to-day operations.

What Notion AI Can Do

Write and Generate Content

Ask Notion AI to write a job description, draft a client proposal, create an onboarding guide, or generate an email template — all based on a simple prompt. It produces professional, context-aware content in seconds that you can refine and use immediately.

Summarize Pages and Databases

Notion AI can read a long candidate profile, a meeting page full of notes, or a dense policy document and produce a crisp, accurate summary. This is invaluable for quickly getting up to speed on any record in your workspace.

Edit and Improve Writing

Paste any draft text — a shift description, a performance review, a client email — and ask Notion AI to improve clarity, fix grammar, adjust the tone, make it more concise, or translate it into another language. It works as a skilled editor available at all hours.

Answer Questions About Your Workspace

With the Q&A; feature, you can ask Notion AI questions like 'What are our onboarding steps for healthcare workers?' or 'What is our late cancellation policy?' and it will search your knowledge base and return an accurate answer — no scrolling required.

Brainstorm and Ideate

Stuck on how to structure a new workflow, improve a process, or respond to a difficult client situation? Notion AI can generate options, frameworks, and ideas on demand — acting as a creative thinking partner for your team.

Fill in Database Properties

Notion AI can auto-fill certain database properties — such as generating a summary of a candidate page, categorizing an expense, or extracting key information from pasted text — dramatically reducing manual data entry.

Action Item Extraction

After a meeting or call, paste your raw notes into Notion and ask AI to extract the action items, decisions made, and follow-up tasks. It turns messy notes into structured, assignable to-do lists in under 30 seconds.

Notion AI in Your Staffing Workflow

The following examples show exactly how Notion AI integrates into the daily work of a staffing agency — turning hours of manual effort into minutes of AI-assisted action.

Staffing Agency Use Cases for Notion AI

- Recruiting: Generate a complete, tailored job description from a short brief in one prompt
- Candidate Review: Summarize a candidate's profile and notes into a one-paragraph snapshot for hiring managers
- Client Communications: Draft professional client update emails based on bullet points you provide
- Onboarding: Generate a role-specific onboarding checklist from a job title and responsibilities
- Performance Reviews: Turn manager notes into a structured, balanced performance review write-up
- Scheduling: Ask AI to suggest optimal shift assignments based on candidate availability and skills
- Knowledge Base: Have AI write policy summaries, FAQ answers, and procedure guides in plain language
- Financial: Auto-categorize expense entries and summarize monthly spending by category
- Meeting Notes: Extract decisions, action items, and owners from raw meeting transcripts instantly
- Compliance: Use AI to check policy documents for clarity and flag ambiguous language

Benefits for Your Team

Notion AI delivers measurable benefits across every role in your staffing agency — not just leadership or operations. When your entire team has access to AI assistance within the tool they already use every day, the compounding productivity gains are significant.

Recruiters spend less time writing and more time building relationships. Operations managers spend less time formatting and more time optimizing. Business owners spend less time summarizing and more time making decisions. Notion AI removes the low-value busywork that slows every team down.

■ Key Notion Features

- Time savings — reduce hours spent on writing, formatting, and manual data entry
- Consistency — AI-generated content follows the same structure and tone every time
- Speed to quality — go from rough idea to polished output in minutes, not hours
- Accessibility — every team member becomes a stronger writer and communicator
- Reduced context-switching — AI assistance lives inside your existing workspace
- Knowledge retention — AI helps document institutional knowledge before it walks out the door
- Scalability — handle more candidates, clients, and shifts without proportional staff increases
- Error reduction — AI catches typos, inconsistencies, and missing information in records

Getting Started with Notion AI

Notion AI is available on paid Notion plans (Plus, Business, and Enterprise) and can also be added as an add-on. To activate it, navigate to Settings & Members and enable Notion AI for your workspace.

Once active, you can access Notion AI anywhere in your workspace by pressing the **Space bar** on an empty line, or by highlighting text and selecting AI from the toolbar. You can also use the **/AI** command to trigger AI actions on any page.

Start with these three high-value actions to see immediate results: (1) paste a set of candidate notes and ask AI to summarize them, (2) type a short job brief and ask AI to write a full job description, and (3) drop in raw meeting notes and ask AI to extract action items.

■ Pro Tip: Treat Notion AI as a first draft engine, not a final output machine. Always review and personalize AI-generated content before sharing with clients or candidates. Your human judgment and agency expertise are what make the final output exceptional.

The Future of AI in Staffing

Notion continues to invest heavily in AI capabilities — from deeper database intelligence to more sophisticated automation triggers and cross-workspace insights. Staffing agencies that build their operations on Notion today are positioning themselves to take advantage of these advances as they arrive.

CHAPTER 1

Setting up a Staffing Agency Dashboard in Notion

One of the key benefits of using Notion in a staffing agency is the ability to create a customizable dashboard that brings all of your most important information and tools into one place. In this chapter, we will cover how to set up a staffing agency dashboard in Notion that will help you stay organized and efficient.

To start, create a new page in Notion and give it a descriptive title such as **Staffing Agency Dashboard**. From there, you can begin adding databases, linked views, and quick-action templates tailored to your agency's workflow.

A well-designed dashboard serves as your command center — giving you instant visibility into open jobs, available candidates, today's shifts, and outstanding tasks — all from a single page.

■ **Key Notion Features**

- Candidates database — Name, Status, Availability, Skills, Related Openings
- Job Openings database — Client, Status, Recruiter, Linked Candidates
- Schedules database — Date, Role, Staff, Pay Rate, Status
- Clients database — Contact, Industry, Open Openings (Rollup)
- Tasks database — Priority, Assignee, Due Date, Related Records
- Linked views on dashboard for real-time snapshots
- Templates for New Candidate, New Job Opening, New Client
- Permission levels: editors for team, view-only for stakeholders

■ **Pro Tip:** Start with three linked database views on your dashboard — Available Candidates, Open Jobs, and Today's Shifts — and expand from there as your workflow matures.

The agencies that will thrive in the coming years are not those that resist AI, but those that learn to direct it strategically — using AI to handle the repeatable, and freeing their human talent to focus on relationships, judgment, and growth.

Your staffing machine — powered by Wix on the outside and Notion AI on the inside — is not just a business tool. It is a competitive advantage.

CHAPTER 12 ★NEW

Integrating Wix with Your Staffing Agency Operations

Wix is more than a website builder — it is your staffing agency's digital front door. When integrated thoughtfully with Notion and your back-office systems, Wix becomes the client-facing engine that captures leads, showcases job openings, and automates the first touch of every candidate and client relationship.

This chapter walks through how to connect your Wix website to the operational systems you have built throughout this book — turning your public-facing site into a live, data-driven extension of your staffing machine.

Why Wix Works for Staffing Agencies

Staffing agencies live and die by first impressions. A polished, professional website signals credibility to both clients seeking talent and candidates seeking opportunity. Wix provides a no-code platform that lets you build that presence quickly — and keep it updated without a developer on retainer.

Beyond aesthetics, Wix's suite of built-in tools (Wix Forms, Wix Automations, Wix CRM, and Wix Bookings) allows you to automate the intake process from the moment a visitor lands on your site to the moment their application or inquiry lands in your Notion database.

Setting Up Your Staffing Agency Website on Wix

Start with a Wix template designed for professional services or recruiting. Customize the color scheme to match your brand — for MEG, that means dark teal, orange, and white. Your homepage should immediately communicate who you serve (clients or candidates), what you offer (staffing solutions), and how to take action (apply now, request talent).

Create dedicated pages for: Job Board (listing open positions), Candidate Application (intake form for job seekers), Client Inquiry (intake form for businesses seeking staff), About Us (your agency's story and expertise), and Resources (a blog or content library that builds trust and SEO authority).

Core Wix Features for Staffing Agencies

- Wix Forms — Collect candidate applications and client inquiries with fully customizable forms
- Wix CRM — Automatically capture every lead into a contact list for follow-up
- Wix Automations — Trigger emails, tasks, or notifications the moment a form is submitted
- Wix Bookings — Let clients and candidates schedule consultations directly on your calendar

- Wix Blog — Publish staffing tips, industry insights, and company news to build SEO
- Wix Members Area — Create a portal for registered candidates to check application status
- Wix Analytics — Track site visitors, conversion rates, and top-performing pages
- Dynamic Pages — Display job listings pulled from a Wix database collection automatically

Building a Job Board on Wix

One of the most powerful things you can build on Wix is a dynamic job board. Using Wix's Content Manager (CMS), create a 'Job Openings' collection with fields for Job Title, Location, Type (Full-time / Part-time / Contract), Industry, Description, and Status (Open / Filled).

Connect this collection to a dynamic list page that automatically displays all open positions. Each listing links to its own dynamic detail page where candidates can read the full description and click an 'Apply Now' button that opens your candidate intake form — pre-filled with the job title.

When you add or update a job in your Wix CMS, the site updates automatically. You can also connect your Wix job board to your Notion database using a third-party automation tool like Zapier or Make, so that every new Notion job record publishes to Wix, and every Wix application feeds back into Notion.

Automating Candidate and Client Intake

Every form submission on your Wix site should trigger a chain of automated actions. When a candidate submits an application, they should immediately receive a confirmation email, your team should receive a notification, and the record should be logged — either in Wix CRM or piped directly to Notion.

Use Wix Automations to set up these flows without code. Navigate to Automations in your Wix dashboard and create a new automation triggered by 'Form submission.' Add actions: Send email to contact (confirmation), Send email to team (alert with form data), and optionally Add contact to a label in Wix CRM.

For connecting Wix to Notion, use Zapier or Make. Create a Zap that fires when a new Wix form submission arrives and creates a new entry in your Notion Candidates or Clients database. Map form fields to the appropriate Notion properties — name, email, phone, position of interest, availability, and notes.

Connecting Wix Bookings to Your Scheduling System

Wix Bookings allows clients and candidates to schedule calls, interviews, or consultations directly on your website — syncing with your calendar and eliminating the back-and-forth of scheduling emails. Set up

service types (e.g., 'Initial Candidate Screening,' 'Client Discovery Call,' 'Job Placement Consultation') and define your team's availability.

When a booking is confirmed, Wix automatically sends calendar invites to both parties, reduces your available slots, and can trigger follow-up automations. Integrate Wix Bookings with Google Calendar to keep your scheduling centralized, and use a Zapier trigger on new bookings to create a corresponding task or meeting record in Notion.

Wix + Notion Integration Blueprint

- Step 1 — Build your Wix forms (candidate application, client inquiry, contact us)
- Step 2 — Set up Wix Automations for instant email confirmations and team alerts
- Step 3 — Connect Zapier/Make: Wix Form Submission → Notion Database Entry
- Step 4 — Connect Zapier/Make: Notion Job Opening → Wix CMS Job Board
- Step 5 — Set up Wix Bookings + Google Calendar sync for scheduling
- Step 6 — Connect new Wix Bookings → Notion task or calendar entry via Zapier
- Step 7 — Use Wix Analytics + Notion dashboard to track conversion rates
- Step 8 — Review and optimize the full pipeline monthly

Using Wix SEO Tools to Attract More Clients and Candidates

Wix includes a built-in SEO assistant (Wix SEO Wiz) that walks you through optimizing each page for search engines. For a staffing agency, your most important SEO pages are your job listings, your homepage, and your blog. Each job listing should include the job title, location, and industry in the page title and URL slug.

Publish blog posts that answer questions your ideal clients and candidates are searching for — 'How to hire a temp worker,' 'Best staffing agencies in [city],' or 'What to expect in a staffing agency interview.' Each post builds authority, drives organic traffic, and feeds potential leads into your intake funnel.

Connect your Wix site to Google Search Console and Google Analytics to monitor which pages rank, where traffic comes from, and which pages convert visitors into applicants or inquiries. Feed these insights into your Notion analytics dashboard to get a complete picture of your business growth.

■ **Pro Tip:** An outdated job board — with closed positions still showing or no new listings for weeks — signals inactivity to potential candidates. Set a weekly recurring task in Notion to audit your Wix job board: archive filled roles, add new openings, and update any listings that have changed. A live, accurate job board is one of the strongest trust signals your site can send.

The Complete Staffing Machine: Wix + Notion + AI

When Wix, Notion, and Notion AI work together, you have built something most staffing agencies never achieve: a fully integrated, largely automated business system that handles the entire candidate and client lifecycle — from the first website visit to placement, billing, and beyond.

Wix captures and converts. Notion organizes and tracks. Notion AI accelerates your team's output. Together, they form the staffing machine described throughout this book — one that runs with consistency, scales without chaos, and frees you to focus on what only humans can do: build trust, make judgment calls, and grow relationships.

The journey to a fully systematized staffing agency does not happen overnight. But with each chapter of this book as your guide, you have a clear roadmap. Start with one system, get it running smoothly, then build the next. Before long, the machine will be running — and you will be steering it with confidence.

Maryland Empowerment Group

Empowering Small Businesses to Scale Through Systems

"Build systems, not stress."

The Staffing Machine

Systems with Wix and Notion

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