

AI IMPLEMENTATION · HIRING & SCREENING

Turning 50+ reference checks a week into a one-click review.

How Jam AI built The Washburn Agency an end-to-end AI system that researches, scores, and verifies references automatically — and keeps a human in the driver's seat.

CLIENT

The Washburn Agency

INDUSTRY

Staffing & nanny placement

ENGAGEMENT

AI reference screening build

BEFORE

- Search Google, TruePeople & Intelius by hand
- Text every reference individually
- Chase non-responders manually
- Type call notes verbatim, live
- Pay an outside vendor \$15-\$25 per social check

AFTER

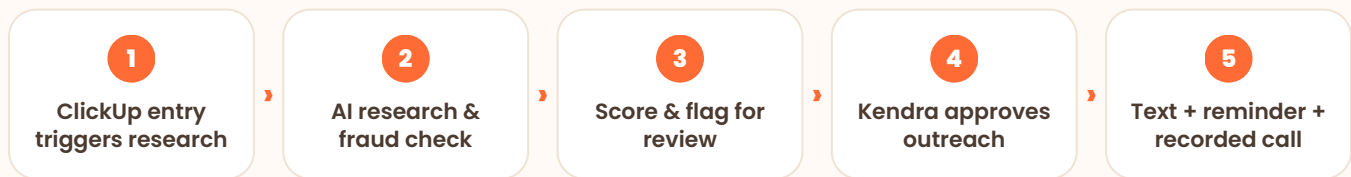
- One dashboard runs research automatically
- AI scores & flags fake references
- Texts & reminders fire on their own
- Calls recorded & transcribed
- Social screening built in-house

— THE CHALLENGE

At The Washburn Agency, reference checking was one person doing everything by hand — and drowning in it.

Team member Kendra was processing 50+ references a week manually: searching Google, TruePeople, and Intelius to confirm each reference was a real person, texting every reference one at a time to schedule a call, following up by hand when they went quiet, and typing notes verbatim during every conversation. On top of all that labor, the agency paid an outside vendor \$15–\$25 per check just for social media screening. It didn't scale, and it was eating the team alive.

— THE FLOW WE DESIGNED



— WHAT WE BUILT

- One central dashboard** that runs the whole pipeline, from a new ClickUp entry through to a recorded, transcribed call.

- Automated research & identity verification** using Trestle reverse-phone and reverse-address data to pull household and relative info — so fake references get caught by "shared household" and "cross-reference" checks.

- AI scoring with Claude.** Each reference gets a 0–100 score. Clear passes auto-approve; anything suspicious lands as "Pending Review" with the exact red flags listed.

- Built-in social media screening** that replaces the outside vendor spend entirely.

- Automated SMS outreach** with a scheduling link, plus a 3-day auto-reminder if a reference hasn't booked.

- Call recording & transcription** so Kendra never types notes by hand again.

— HOW WE WORKED

We scoped the build around Washburn's *real* workflow — including a narrated screen recording of Kendra's process — so the AI scored references the way the team actually judges them. *human in the loop, by design*

And when carrier rules repeatedly blocked compliant business texting, we didn't paper over it. We ruled out the dead ends, tested a working path ourselves, and laid out the trade-offs honestly so Sarah could make the call with eyes open.

— THE OUTCOME

Five tools became one

A manual hunt across Google, TruePeople, and Intelius collapsed into a single automated pipeline.

An outside cost, eliminated

Social screening moved in-house, retiring the \$15-\$25-per-check vendor bill.

Kendra keeps control

She went from doing every step to reviewing and approving — she keeps the judgment, loses the busywork.

Four figures down to under \$20

A four-figure-per-month texting quote was replaced with a working solution under \$20 a month.

The honest-broker difference. When the obvious texting vendors hit a compliance wall, we kept digging until we found a path that actually sends — and told Sarah exactly where the trade-offs were. No overselling, no four-figure workaround.

"Wow, this is **really amazing!!**"

— Sarah Washburn, President & Founder, The Washburn Agency