TALENT ENGINEERING ACADEMY

Account Development and Repeat Business

PRACTICE WORKBOOK

Earn repeat work through delivery evidence, useful account reviews and relevant expansion conversations.

PATHWAY	Recruitment Commercial and Independent Practice
LEVEL	Practitioner
EDITION	2026.09
UPDATED	2026-09-24

Free learning. Practical work. Better recruitment.

An education initiative by Vitae.

WORKBOOK GUIDE

Build something useful as you learn.

This workbook turns the course into a practical piece of work you can review, refine and adapt. Print it, annotate it digitally, or use the prompts in your preferred notes tool.

YOUR COURSE DELIVERABLE

An account development plan with service review and expansion hypotheses.

How to use this workbook

01 Work through the course lessons in order, then complete the matching workbook prompts.

02 Use fictional or properly authorised information. Do not add candidate or client confidential data.

03 Compare your decisions with the self-review guidance. Revise assumptions, gaps and unclear ownership.

04 Keep the finished workbook as evidence of your learning and as a starting point for real work.

BEFORE YOU START

Talent Engineering Fundamentals, or equivalent recruitment experience.

Course page: https://talentengineering.org/courses/account-development

PART 1

Plan your course deliverable.

Use these planning pages to define what you are producing before you work through the lesson exercises. Return to them as your thinking develops.

WORKSHEET 01

Client outcomes and delivery evidence

Capture the evidence, decisions, assumptions, owners and next actions that make this section usable.

YOUR WORKING NOTES

WORKSHEET 02

Stakeholder relationships and permissions

Capture the evidence, decisions, assumptions, owners and next actions that make this section usable.

YOUR WORKING NOTES

WORKSHEET 03

Recurring needs and hypotheses

Capture the evidence, decisions, assumptions, owners and next actions that make this section usable.

YOUR WORKING NOTES

WORKSHEET 04

Service review and unresolved issues

Capture the evidence, decisions, assumptions, owners and next actions that make this section usable.

YOUR WORKING NOTES

WORKSHEET 05

Relevant next offer and capacity

Capture the evidence, decisions, assumptions, owners and next actions that make this section usable.

YOUR WORKING NOTES

WORKSHEET 06

Concentration and relationship health

Capture the evidence, decisions, assumptions, owners and next actions that make this section usable.

YOUR WORKING NOTES

PART 2

Apply each lesson.

Each exercise is designed to turn the lesson into evidence of practice. Complete the task, then use the guidance to challenge your first answer.

LESSON 01 / 04

Start with the value actually delivered

YOUR PRACTICE TASK

Write a post-engagement review with three evidence points and two improvement questions.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

A client appreciates the market intelligence but found weekly updates hard to interpret. The account plan improves reporting before proposing a broader search programme.

SELF-REVIEW GUIDANCE

Include a limitation or unresolved issue. Avoid claiming credit for outcomes you have not observed or that depend on other teams.

LESSON 02 / 04

Map relationships beyond a single sponsor

YOUR PRACTICE TASK

Create an account relationship map with three useful introductions and their purpose.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

A plant sponsor introduces the recruiter to a central talent lead to discuss recurring technical hiring. The recruiter aligns with the internal process instead of pitching every site independently with inconsistent claims.

SELF-REVIEW GUIDANCE

Each introduction should have a legitimate service reason. Distinguish confirmed authority from assumptions and record the preferred route through the account.

LESSON 03 / 04

Develop expansion hypotheses from real needs

YOUR PRACTICE TASK

Write three expansion hypotheses and one reason each might be inappropriate.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

A client repeatedly struggles to define new technical roles. A scoped brief-design workshop may fit better than immediately selling another full search engagement or a software subscription.

SELF-REVIEW GUIDANCE

Connect every offer to observed need and delivery capability. Include a low-commitment validation step and a condition for deciding not to proceed.

LESSON 04 / 04

Manage continuity and concentration

YOUR PRACTICE TASK

Create a quarterly account review with service, opportunity, capacity and concentration sections.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

One account supplies half a fictional practice’s fees and asks for several urgent searches. The owner reviews capacity and downside exposure before agreeing, rather than treating all expansion as automatically beneficial.

SELF-REVIEW GUIDANCE

Include a scenario where the sponsor leaves or demand pauses. Specify relationship and business actions that reduce dependence without neglecting the existing client.

FINAL REVIEW

Strengthen the work before you use it.

Review the completed workbook as one connected piece of work. The strongest deliverables are internally consistent, explicit about limitations and clear about who decides what happens next.

- [ ] The work distinguishes facts, evidence, assumptions and open questions.
- [ ] Decisions have named owners, dates and review points.
- [ ] Measures connect to the outcome rather than activity alone.
- [ ] Risks, accessibility needs, privacy considerations and limitations are visible.
- [ ] The next action is specific enough for another person to follow.
- [ ] The finished deliverable can be explained in plain language.

FINAL CHANGES AND NEXT ACTIONS

FURTHER READING

Continue with trusted sources.

These sources support further study. A reference does not imply endorsement. Check the current official rules and obtain appropriate professional advice for real legal, financial or regulated decisions.

CIPD: Recruitment

Professional context for the recruitment lifecycle.

https://www.cipd.org/uk/knowledge/factsheets/recruitment-factsheet/

GOV.UK: Set up a business

UK starting point. Business structure and obligations depend on the circumstances.

https://www.gov.uk/set-up-business

ABOUT THIS WORKBOOK

Original educational scenarios. Practical work is self-directed and is not independently assessed. Adapt any method to your context with appropriate review.

Talent Engineering Academy is an education initiative by Vitae.