TALENT ENGINEERING ACADEMY

Account Mapping and Hiring-Signal Research

PRACTICE WORKBOOK

Map organisations and buying roles, then turn public changes into careful discovery hypotheses.

PATHWAY	Recruitment Commercial and Independent Practice
LEVEL	Practitioner
EDITION	2026.09
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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 map and signal-to-question research brief.

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-mapping-signals

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

Account identity and operating units

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

YOUR WORKING NOTES

WORKSHEET 02

Problem, budget and procurement roles

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

YOUR WORKING NOTES

WORKSHEET 03

Signal, source and date

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

YOUR WORKING NOTES

WORKSHEET 04

Alternative explanations

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

YOUR WORKING NOTES

WORKSHEET 05

Relevant hiring hypothesis

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

YOUR WORKING NOTES

WORKSHEET 06

Contact route and next question

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

Understand the account structure

YOUR PRACTICE TASK

Draw a fictional account map with five roles and two unresolved authority questions.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

A manufacturing group has central procurement but local plant hiring decisions. The map separates supplier approval from role sponsorship so the recruiter approaches the right process without bypassing established contacts.

SELF-REVIEW GUIDANCE

Distinguish a person’s title from confirmed decision authority. Include internal talent acquisition as a stakeholder rather than assuming it is an obstacle to work around.

LESSON 02 / 04

Interpret signals with alternative explanations

YOUR PRACTICE TASK

Analyse three fictional signals with two explanations each and a verification question.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

A company advertises ten roles after an acquisition. This may reflect integration, replacement or expansion. The research brief asks which capability gaps matter rather than asserting a hiring crisis.

SELF-REVIEW GUIDANCE

Keep facts, interpretations and questions in separate fields. A good question lets the buyer correct the hypothesis without first rejecting an exaggerated claim.

LESSON 03 / 04

Prioritise accounts by fit and readiness

YOUR PRACTICE TASK

Prioritise six fictional accounts and explain the top two choices.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

Two accounts fit the niche. One has a confirmed project and a relevant introduction; the other has only a two-year-old announcement. The first receives deeper research while the second remains in a lower-intensity review queue.

SELF-REVIEW GUIDANCE

Show the evidence and uncertainty behind the ranking. If a small arbitrary weight change reverses the order, use judgement and more research rather than pretending the score is exact.

LESSON 04 / 04

Maintain a signal-to-action workflow

YOUR PRACTICE TASK

Build a signal log with three outcomes and a refresh rule.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

A site announcement leads to a conversation confirming that hiring will begin next spring. The account plan records a permissioned follow-up date and stops treating the signal as immediate demand.

SELF-REVIEW GUIDANCE

Include confirmed no-need and future-timing outcomes. The next action should reflect what the buyer actually said, not the original automated trigger.

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.