TALENT ENGINEERING ACADEMY

Advanced Search and Sourcing Methods

PRACTICE WORKBOOK

Build and debug search strategies across title variants, capabilities and legitimate research channels.

PATHWAY	Talent Intelligence and Sourcing
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

A tested query library and channel plan with inclusion checks.

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/advanced-search-sourcing

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

Role concepts and synonym groups

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

YOUR WORKING NOTES

WORKSHEET 02

Query and supported syntax

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

YOUR WORKING NOTES

WORKSHEET 03

Sample relevance and missing cases

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

YOUR WORKING NOTES

WORKSHEET 04

Channel coverage and permitted use

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

YOUR WORKING NOTES

WORKSHEET 05

Exclusion risks and revisions

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

YOUR WORKING NOTES

WORKSHEET 06

Search log and next experiment

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

Translate a brief into searchable concepts

YOUR PRACTICE TASK

Build four concept groups and a broad first query for a fictional reliability lead.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

A reliability role may appear under maintenance, asset integrity or plant engineering. The query library records these variants and tests whether the resulting work resembles the brief before narrowing by title.

SELF-REVIEW GUIDANCE

Use OR within a synonym group and the tool’s supported intersection method between essential groups. Explain why at least one preferred requirement is left out initially. A query is a hypothesis to inspect, not an eligibility rule.

LESSON 02 / 04

Debug precision and missed coverage

YOUR PRACTICE TASK

Review ten fictional results and calculate precision, then identify one query change.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

A query for QA returns software testers and manufacturing quality staff. Adding production context improves relevance, but requiring one exact title removes a known suitable quality manager. The search log records both effects.

SELF-REVIEW GUIDANCE

If six of ten reviewed results meet the rule, sample precision is 60%. Explain that this says nothing by itself about how many relevant people were missed. Include uncertain cases transparently rather than silently counting them as successes.

LESSON 03 / 04

Combine channels with a reason

YOUR PRACTICE TASK

Design a three-channel plan with one coverage benefit and one limitation per channel.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

For a specialist metrology role, the team reviews relevant conference speakers and professional communities alongside standard databases. It checks actual responsibilities and uses appropriate professional contact routes rather than assuming every speaker is seeking a job.

SELF-REVIEW GUIDANCE

Explain what each channel adds, how you will use it legitimately and how candidates receive the same assessment opportunity. Include a route for people outside your immediate network.

LESSON 04 / 04

Maintain a reusable search log

YOUR PRACTICE TASK

Write a search log for three iterations, including a failed query and a next test.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

A query works for UK maintenance leaders but performs poorly in Germany because job terminology differs. The log captures the context and local variants instead of treating the original query as a global standard.

SELF-REVIEW GUIDANCE

Each iteration should identify what changed and what the sample showed. Include dates and syntax assumptions. Keep failure notes because they prevent repeated effort and reveal coverage limitations.

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/

ICO: Recruitment and selection

UK guidance. Check its current status and updates before implementation.

https://ico.org.uk/for-organisations/uk-gdpr-guidance-and-resources/employment/recruitment-and-selection/

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.