TALENT ENGINEERING ACADEMY

Candidate and Company Research

PRACTICE WORKBOOK

Build concise research briefs that separate professional facts, hypotheses and questions worth asking.

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 candidate evidence brief and a company hiring hypothesis.

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/candidate-company-research

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

Research purpose and permitted scope

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

YOUR WORKING NOTES

WORKSHEET 02

Confirmed professional facts and sources

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

YOUR WORKING NOTES

WORKSHEET 03

Relevant context and dates

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

YOUR WORKING NOTES

WORKSHEET 04

Hypotheses clearly labelled

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

YOUR WORKING NOTES

WORKSHEET 05

Missing evidence and verification questions

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

YOUR WORKING NOTES

WORKSHEET 06

Next action and data handling

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

Set a proportionate research scope

YOUR PRACTICE TASK

Write a research scope with five permitted fields and three exclusions for a fictional role.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

A recruiter researching a production leader records project responsibility and public professional contributions. Family photographs and personal political posts are excluded because they do not support the agreed assessment criteria.

SELF-REVIEW GUIDANCE

Every field should connect to a decision or contact purpose. Exclusions should be practical enough to guide a researcher when irrelevant information appears. Public accessibility is not a blanket permission to reuse data.

LESSON 02 / 04

Read candidate evidence in context

YOUR PRACTICE TASK

Rewrite three fictional profile claims into evidence notes and follow-up questions.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

A profile says the candidate worked on a £10m programme. The brief records programme exposure, not ownership of the entire budget. A follow-up asks which decisions and deliverables the candidate personally owned.

SELF-REVIEW GUIDANCE

Use restrained language such as contributed to until ownership is established. Preserve context and source dates. Avoid turning absence of a listed skill into proof that the person lacks it.

LESSON 03 / 04

Research organisations as changing systems

YOUR PRACTICE TASK

Create a company brief using three fictional events and two competing hiring explanations.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

A company announces a new facility but says production begins next year. The hypothesis concerns phased leadership and commissioning needs, not an immediate claim that it urgently needs agency help.

SELF-REVIEW GUIDANCE

Record what is confirmed, what follows only as a hypothesis and what a conversation must establish. One event can justify research without justifying a sales forecast or an assertion of hiring urgency.

LESSON 04 / 04

Synthesize a brief that can be checked

YOUR PRACTICE TASK

Produce a one-page brief with three facts, two hypotheses and three verification questions.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

A brief recommends a discovery conversation because two independently observed changes suggest a commissioning programme. It labels timing and external support needs as unknown and proposes two questions instead of a confident sales pitch.

SELF-REVIEW GUIDANCE

A reader should identify which sentence is a fact and locate its supporting source. Remove any claim that cannot be supported or clearly labelled. End with the smallest useful next step, not an assumed commercial commitment.

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.