TALENT ENGINEERING ACADEMY

Candidate Outreach That Connects

PRACTICE WORKBOOK

Write relevant, accurate outreach, manage follow-up respectfully and learn from response quality.

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 three-step outreach sequence and reply-handling guide.

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-outreach

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

Verified reason for contact

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

YOUR WORKING NOTES

WORKSHEET 02

Role facts and unresolved details

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

YOUR WORKING NOTES

WORKSHEET 03

Candidate value and realistic next step

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

YOUR WORKING NOTES

WORKSHEET 04

Contact permission, channel and preferences

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

YOUR WORKING NOTES

WORKSHEET 05

Follow-up stopping rules

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

YOUR WORKING NOTES

WORKSHEET 06

Reply categories and learning

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 / 05

A useful first conversation

YOUR PRACTICE TASK

Draft a message of fewer than 100 words for a fictional quality leadership role. Include one evidence-backed reason for contact, two useful role details and a simple question.

YOUR RESPONSE

LESSON 02 / 05

Earn relevance with specific evidence

YOUR PRACTICE TASK

Draft a first message of fewer than 100 words using two confirmed role facts.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

A fictional message references a candidate’s published work on production traceability and a role responsible for that outcome. It asks whether a short role summary would be useful and does not assume the person wants to leave.

SELF-REVIEW GUIDANCE

Underline each factual claim and link it to your research notes. Remove invented urgency and unsupported praise. The recipient should understand the work and be able to decline without pressure.

LESSON 03 / 05

Make the next step small and honest

YOUR PRACTICE TASK

Write two calls to action: one for a confirmed role and one for a market conversation.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

A recruiter has market knowledge but no live mandate. The message invites a market conversation and says that plainly. It does not advertise a fictional vacancy to gather candidate details.

SELF-REVIEW GUIDANCE

The confirmed-role request can offer a brief. The research conversation must identify its actual purpose. Neither should imply a guaranteed interview, offer or confidential client mandate without evidence.

LESSON 04 / 05

Design follow-up around information and choice

YOUR PRACTICE TASK

Design a three-contact sequence with a stop rule and a withdrawal scenario.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

A candidate asks not to receive further role messages. The recruiter records the preference in the shared system and checks that queued follow-ups are cancelled, rather than merely removing the person from one spreadsheet.

SELF-REVIEW GUIDANCE

Each follow-up should add something material. Show how a decline, reply or preference change stops queued actions. Do not treat a platform change as permission to restart an unwanted sequence.

LESSON 05 / 05

Measure conversation quality and improve

YOUR PRACTICE TASK

Classify twelve fictional replies and propose one improvement to the sequence.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

Variant A gets ten replies, including six asking what the role actually is. Variant B gets seven replies, five of which lead to informed conversations. The team examines relevance and clarity rather than declaring A the winner by reply count.

SELF-REVIEW GUIDANCE

Separate informative interest from confusion and opt-outs. Explain the denominator and uncertainty. A useful revision may clarify location or scope rather than adding more persuasive language.

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.