TALENT ENGINEERING ACADEMY

Discovery, Role Qualification and Search Strategy

PRACTICE WORKBOOK

Run discovery that connects hiring outcomes, delivery constraints and a mutually agreed search plan.

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

A discovery record and qualified search strategy.

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/discovery-role-qualification

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

Business outcome and vacancy cause

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

YOUR WORKING NOTES

WORKSHEET 02

Essential evidence and role conditions

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

YOUR WORKING NOTES

WORKSHEET 03

Budget, authority and decision process

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

YOUR WORKING NOTES

WORKSHEET 04

Market assumptions and alternatives

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

YOUR WORKING NOTES

WORKSHEET 05

Delivery plan and client commitments

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

YOUR WORKING NOTES

WORKSHEET 06

Risks, next action and acceptance decision

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

Discover the outcome behind the request

YOUR PRACTICE TASK

Write ten discovery questions grouped around outcome, context and unresolved decisions.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

A client asks for an immediate operations director. Discovery reveals the near-term need is stabilising scheduling while the long-term structure is undecided. The recruiter explores interim support and role design before assuming a permanent executive search is ready.

SELF-REVIEW GUIDANCE

Questions should reveal evidence and tradeoffs rather than lead the buyer to your preferred service. Include what would happen if the role were not filled immediately.

LESSON 02 / 04

Qualify conditions for successful delivery

YOUR PRACTICE TASK

Complete a qualification record for a fictional search with three unresolved conditions.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

A client wants a shortlist in ten days but the approver is unavailable for a month. The plan addresses decision availability rather than treating shortlist speed as the only delivery requirement.

SELF-REVIEW GUIDANCE

For each gap, state the consequence, owner and resolution date. Classify the search as ready, conditionally ready or not ready, with a reasoned recommendation.

LESSON 03 / 04

Design the search strategy with alternatives

YOUR PRACTICE TASK

Create a search plan with three lanes, milestones and one contingency.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

The initial plan tests two adjacent industries and a narrower direct competitor lane. After ten substantive conversations, the team reviews whether location and compensation are limiting interest before increasing contact volume.

SELF-REVIEW GUIDANCE

Link each lane to role capabilities and state the evidence that would trigger a change. Include client review responsibilities and avoid interpreting low response as proof of no talent.

LESSON 04 / 04

Agree the working search brief

YOUR PRACTICE TASK

Write a one-page confirmation and a scope-change note for your fictional search.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

A client adds a new geographic territory after research begins. The recruiter documents the scope change and agrees its delivery implications rather than absorbing it invisibly and missing the original commitments.

SELF-REVIEW GUIDANCE

State what changed, why, who approved it and how the plan is affected. Keep candidate communications aligned with the new brief and do not silently apply new requirements to earlier assessments.

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.