TALENT ENGINEERING ACADEMY

Ethics, Confidentiality and Professional Boundaries

PRACTICE WORKBOOK

Handle conflicts, representation and commercial pressure with transparent professional judgement.

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 professional conduct checklist and conflict-escalation 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/ethics-professional-boundaries

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

Who is affected and what is known

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

YOUR WORKING NOTES

WORKSHEET 02

Authority and representation

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

YOUR WORKING NOTES

WORKSHEET 03

Confidentiality and permitted sharing

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

YOUR WORKING NOTES

WORKSHEET 04

Conflicts and disclosure route

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

YOUR WORKING NOTES

WORKSHEET 05

Options, consequences and decision

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

YOUR WORKING NOTES

WORKSHEET 06

Record, communication and review

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

Represent people and opportunities accurately

YOUR PRACTICE TASK

Write a representation checklist for candidate submission and client outreach.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

A recruiter knows a strong candidate but has not discussed a particular client. They seek the appropriate agreement before presenting the person rather than sending an identifiable CV to create a speculative opportunity.

SELF-REVIEW GUIDANCE

Include identity, scope, current interest, permission and factual accuracy. Separate a general market conversation from authority to submit for a specific opportunity.

LESSON 02 / 04

Protect confidentiality in ordinary work

YOUR PRACTICE TASK

Review five fictional information-sharing scenarios and decide share, minimise, seek permission or stop.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

A recruiter wants to share a case study about a unique executive appointment. Removing the name still leaves the company, timing and role identifiable, so the story needs permission or a genuinely fictional redesign.

SELF-REVIEW GUIDANCE

Explain the purpose and recipient's need in each case. Include indirect identification risk and an attachment check. Avoid using confidentiality as a reason to conceal a material error from the responsible owner.

LESSON 03 / 04

Recognise conflicts and undue pressure

YOUR PRACTICE TASK

Create a conflict register with three fictional cases and a management action for each.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

A recruiter has a close personal relationship with an applicant. The process records the conflict and assigns assessment or decision responsibilities to an appropriate independent person rather than relying on an assurance of objectivity.

SELF-REVIEW GUIDANCE

State affected parties, risk, disclosure, decision owner and review. Some conflicts can be managed; others require declining or withdrawing from part of the work.

LESSON 04 / 04

Make and document a defensible choice

YOUR PRACTICE TASK

Write a decision memo for a client request that conflicts with accurate candidate communication.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

A client asks the recruiter to conceal a major change in working conditions until after acceptance. The recruiter explains the need for accurate candidate information and escalates or declines rather than preserving the fee through deception.

SELF-REVIEW GUIDANCE

Document the request, risks, options, advice and final action. Include how the candidate will receive truthful information and how the commercial relationship will be handled professionally.

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.