TALENT ENGINEERING ACADEMY

Plan Your First Recruitment Workflow

PRACTICE WORKBOOK

Specify a reliable recruitment workflow from trigger to verified outcome, with human review and recovery.

PATHWAY	Recruitment AI, Data and Systems
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 workflow specification and fictional test log.

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/first-recruitment-workflow

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

Outcome and scope

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

YOUR WORKING NOTES

WORKSHEET 02

Trigger and stable record identity

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

YOUR WORKING NOTES

WORKSHEET 03

Required inputs and validation

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

YOUR WORKING NOTES

WORKSHEET 04

Steps, permissions and human approval

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

YOUR WORKING NOTES

WORKSHEET 05

Exceptions, retries and duplicate prevention

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

YOUR WORKING NOTES

WORKSHEET 06

Completion evidence and monitoring

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

Make repeatable work reliable

YOUR PRACTICE TASK

Write a workflow plan with a trigger, required inputs, three steps, approval owner, completion record and a response to missing information.

YOUR RESPONSE

LESSON 02 / 05

Choose a repeatable, bounded task

YOUR PRACTICE TASK

Map the manual steps and choose which can be automated for a fictional interview pack.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

A coordinator repeatedly gathers approved role information and interview details into a pack. The workflow can assemble the draft while leaving factual review and sending authority with the recruiter.

SELF-REVIEW GUIDANCE

Name the inputs, output and accountable reviewer. Leave ambiguous or consequential decisions explicit. Explain why this task is sufficiently repeatable for a first pilot.

LESSON 03 / 05

Specify triggers, state and permissions

YOUR PRACTICE TASK

Write trigger and pre-send checks for your workflow.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

An interview booking triggers pack preparation. Before sending, the workflow checks that the interview is still scheduled, the candidate has not withdrawn and the reviewer approved the current pack version.

SELF-REVIEW GUIDANCE

Include stable identifiers, required fields and current-state validation. Approval should identify what was approved and become invalid if material content changes.

LESSON 04 / 05

Design exceptions and safe retries

YOUR PRACTICE TASK

Create five test cases, including a duplicate trigger and an uncertain send result.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

The email service times out after accepting a pack. The workflow records the provider message identifier and reconciles delivery state instead of sending a second copy immediately.

SELF-REVIEW GUIDANCE

Specify expected state and visible operator action for each. The duplicate should not create another send. An uncertain result should remain visible until reconciled, not be marked successful by guesswork.

LESSON 05 / 05

Pilot and hand over the workflow

YOUR PRACTICE TASK

Produce a one-page runbook and a pilot decision using your test results.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

A field rename breaks pack generation during the pilot. The test catches the missing role location, and the handover adds a contract check before the workflow can send any pack.

SELF-REVIEW GUIDANCE

Include permitted scope, owner, checks, recovery and rollback. State unresolved limitations and a bounded next step. Do not declare readiness if exception cases remain untested.

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.

GOV.UK: Responsible AI in recruitment

UK guidance on procuring and deploying recruitment AI.

https://www.gov.uk/government/publications/responsible-ai-in-recruitment-guide/responsible-ai-in-recruitment

NIST: AI Risk Management Framework

Voluntary framework for organising AI risks and controls.

https://www.nist.gov/itl/ai-risk-management-framework

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.