TALENT ENGINEERING ACADEMY

Proposals, Fees, Terms and Commercial Expectations

PRACTICE WORKBOOK

Explain recruitment services, model their economics and prepare clear commercial discussions for proper review.

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 proposal outline and commercial-assumptions checklist.

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/proposals-fees-terms

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

Service scope and exclusions

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

YOUR WORKING NOTES

WORKSHEET 02

Deliverables and mutual responsibilities

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

YOUR WORKING NOTES

WORKSHEET 03

Fee basis and worked calculation

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

YOUR WORKING NOTES

WORKSHEET 04

Payment events and cash timing

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

YOUR WORKING NOTES

WORKSHEET 05

Changes, cancellation and dispute questions

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

YOUR WORKING NOTES

WORKSHEET 06

Professional review and approval

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

Describe the service before the price

YOUR PRACTICE TASK

Draft a proposal outline for a fictional specialist search with five deliverables and three exclusions.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

A mapping proposal promises a defined research scope and decision brief. It does not imply a complete recruitment engagement, guaranteed candidate interest or employment-business services that the provider is not set up to deliver.

SELF-REVIEW GUIDANCE

Make the boundary clear enough to distinguish outputs from outcomes. Include client responsibilities and identify which legal or regulatory questions need professional review.

LESSON 02 / 04

Explain fee mechanics transparently

YOUR PRACTICE TASK

Calculate three fictional fee scenarios and list the definitions needed to avoid ambiguity.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

For illustration, a 20% fee on a defined £60,000 base equals £12,000 before any applicable tax. The example does not decide whether bonuses, allowances or other elements belong in the contractual base.

SELF-REVIEW GUIDANCE

Show arithmetic and distinguish illustrative assumptions from proposed contractual terms. Include payment timing and avoid treating invoiced revenue as cash already available.

LESSON 03 / 04

Surface risks, changes and dependencies

YOUR PRACTICE TASK

Create a negotiation checklist with eight questions and mark those requiring legal input.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

A client changes the role after a finalist is selected. The parties need to determine how the new scope affects delivery and commercial arrangements under their actual agreement, not assume a universal industry rule applies.

SELF-REVIEW GUIDANCE

Focus on clarity and scenario testing. Include a cancelled role, duplicate introduction and changed compensation. Do not write definitive legal conclusions from the course example.

LESSON 04 / 04

Model sustainability and confirm agreement

YOUR PRACTICE TASK

Build a simple engagement cost and cash-timing model and write a go or revise decision.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

A discounted engagement requires the same intensive research but extends payment timing. The cash model shows a funding gap. The recruiter renegotiates scope or timing rather than accepting a headline fee that cannot support delivery.

SELF-REVIEW GUIDANCE

Include delivery hours, overhead assumptions, uncertainty and payment dates. State where professional accounting or legal advice is needed. A viable agreement must be deliverable as well as signed.

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: Employment agencies and businesses

UK sector context. Distinguish introducing permanent staff from supplying workers.

https://www.gov.uk/employment-agencies-and-businesses

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.