TALENT ENGINEERING ACADEMY

References, Offers and Candidate Closing

PRACTICE WORKBOOK

Verify appropriately, manage offer dependencies and support informed candidate decisions without pressure.

PATHWAY	Assessment and Hiring Decisions
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

An offer-readiness checklist and candidate decision plan.

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/references-offers-closing

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

Permitted checks and authorisation

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

YOUR WORKING NOTES

WORKSHEET 02

Offer terms and approval owner

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

YOUR WORKING NOTES

WORKSHEET 03

Conditions and unresolved dependencies

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

YOUR WORKING NOTES

WORKSHEET 04

Candidate priorities and questions

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

YOUR WORKING NOTES

WORKSHEET 05

Communication, acceptance and changes

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

YOUR WORKING NOTES

WORKSHEET 06

Handover and start-date readiness

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

Plan checks for a legitimate purpose

YOUR PRACTICE TASK

Create a reference plan for a fictional role with purpose, timing and permissions.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

A candidate asks that their current employer not be contacted before an agreed stage. The recruiter records the restriction and coordinates permitted alternatives rather than treating the request as suspicious.

SELF-REVIEW GUIDANCE

Specify exactly what needs verification and who can see the result. Include a route for discrepancies and a rule preventing unauthorised contact with a current employer.

LESSON 02 / 04

Confirm offer readiness before promising terms

YOUR PRACTICE TASK

Build a ten-item offer-readiness checklist for a fictional appointment.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

A manager informally suggests two remote days, but the role’s approved arrangement is site-based. The recruiter resolves the discrepancy before sending the offer rather than hoping the candidate will accept first.

SELF-REVIEW GUIDANCE

Include approval, conditions, working pattern, benefits, notice, start date and document version. Identify unresolved items as blockers or clearly communicated conditions, not hidden assumptions.

LESSON 03 / 04

Support an informed decision

YOUR PRACTICE TASK

Write an offer conversation guide with five questions and a transparent next step.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

A candidate values predictable shifts more than the highest salary. The recruiter confirms the actual rota and encourages the candidate to assess it, rather than using a salary increase to distract from an unsuitable working pattern.

SELF-REVIEW GUIDANCE

Focus on understanding, unresolved facts and realistic timing. Include permission to decline. Avoid scripts that manufacture urgency or describe acceptance as irreversible without appropriate advice.

LESSON 04 / 04

Manage acceptance through start readiness

YOUR PRACTICE TASK

Create a two-week pre-start plan and one contingency for a delayed condition.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

A start date changes because a required check is incomplete. The team informs the candidate and hiring manager, updates the onboarding plan and avoids implying that all conditions have been satisfied.

SELF-REVIEW GUIDANCE

Name owners and decision dates for each dependency. Include what the candidate will be told and how commitments are updated. Do not mark the placement fully ready while material conditions remain unresolved.

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: Selection methods

Professional context for selection methods and their limitations.

https://www.cipd.org/uk/knowledge/factsheets/selection-factsheet/

GOV.UK: Discrimination in recruitment

UK legal context. Obtain advice for your jurisdiction and circumstances.

https://www.gov.uk/employer-preventing-discrimination/recruitment

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.