TALENT ENGINEERING ACADEMY

Search Delivery and Client Communication

PRACTICE WORKBOOK

Run a search with clear milestones, evidence-rich updates and controlled changes.

PATHWAY	Recruitment Commercial and Independent Practice
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 search delivery plan, weekly report and escalation protocol.

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/search-delivery-communication

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

Milestones and acceptance criteria

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

YOUR WORKING NOTES

WORKSHEET 02

Research, outreach and assessment work

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

YOUR WORKING NOTES

WORKSHEET 03

Candidate and client communication

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

YOUR WORKING NOTES

WORKSHEET 04

Evidence, risks and decisions needed

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

YOUR WORKING NOTES

WORKSHEET 05

Scope changes and re-planning

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

YOUR WORKING NOTES

WORKSHEET 06

Closure and learning

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 delivery around useful milestones

YOUR PRACTICE TASK

Build a four-week fictional search plan with outputs, owners and dependencies.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

A recruiter limits simultaneous intensive mapping phases because each requires substantial analysis. The plan staggers reviews and agrees client feedback slots rather than promising identical fast delivery to every account.

SELF-REVIEW GUIDANCE

Include a review point for market evidence and a capacity check. A milestone should represent a usable result, not simply a large number of messages sent.

LESSON 02 / 04

Report evidence and decisions, not activity theatre

YOUR PRACTICE TASK

Write a weekly report with progress, evidence, risks and two decisions needed.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

An update reports that relevant candidates consistently ask about shift flexibility and that two search lanes show transferable evidence. It asks the client to decide a working-pattern question rather than simply reporting 200 contacts.

SELF-REVIEW GUIDANCE

Include the source period and sample limits. Each decision should have an owner, deadline and consequence of delay. Avoid disguising low-quality activity as progress.

LESSON 03 / 04

Handle setbacks and scope changes early

YOUR PRACTICE TASK

Draft an escalation note for a fictional search that is two weeks behind its original plan.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

A finalist withdraws because travel expectations changed. The team checks earlier communication, updates the brief and reconfirms interest with remaining candidates rather than treating the event as unpredictable bad luck.

SELF-REVIEW GUIDANCE

State verified causes, affected commitments and options. Include what you can control and what requires client action. Propose a revised plan with explicit assumptions.

LESSON 04 / 04

Close the search and preserve learning

YOUR PRACTICE TASK

Create a closure checklist for a successful hire and a cancelled search.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

A client cancels the role after a strategy change. The recruiter closes candidate conversations, records the reason and produces a permitted market summary rather than leaving the search indefinitely active in the pipeline.

SELF-REVIEW GUIDANCE

Include every affected party and system, not only the invoice. Preserve aggregate learning and remove obsolete tasks. A cancelled search should not remain forecast as future revenue without a new basis.

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.