TALENT ENGINEERING ACADEMY

Talent Pools, Nurture and Relationship Management

PRACTICE WORKBOOK

Build purposeful talent communities with current records, useful contact and reliable preference handling.

PATHWAY	Talent Intelligence and Sourcing
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 talent-pool charter, lifecycle and nurture calendar.

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/talent-pools-nurture

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

Pool purpose and entry criteria

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

YOUR WORKING NOTES

WORKSHEET 02

Record evidence and freshness

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

YOUR WORKING NOTES

WORKSHEET 03

Contact preferences and permitted use

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

YOUR WORKING NOTES

WORKSHEET 04

Value offered and communication cadence

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

YOUR WORKING NOTES

WORKSHEET 05

Exit, suppression and retention rules

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

YOUR WORKING NOTES

WORKSHEET 06

Relationship measures and owner

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

Give a talent pool a defined purpose

YOUR PRACTICE TASK

Write a pool charter with purpose, entry, benefit and accountable owner.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

A fictional automation-engineering pool serves a recurring regional hiring need. Members receive relevant role information and periodic market discussions. The team does not enrol every past applicant into unrelated campaigns by default.

SELF-REVIEW GUIDANCE

State the relationship people are agreeing to and the types of contact they can expect. Include a route to update details or leave. A vague promise of future opportunities is not a maintenance plan.

LESSON 02 / 04

Design the record lifecycle

YOUR PRACTICE TASK

Create lifecycle states for new, active, review-due, inactive and suppressed records.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

A candidate last confirmed their location eighteen months ago. An email delivery today does not verify that location. The record remains due for review until the person or an appropriate current source confirms it.

SELF-REVIEW GUIDANCE

Define entry and exit conditions for each state. Keep suppression separate from inactivity so an inactive record cannot be reactivated into unwanted outreach by a bulk import.

LESSON 03 / 04

Offer useful nurture instead of generic noise

YOUR PRACTICE TASK

Design a three-month calendar with one useful item per month and preference-based exclusions.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

A group interested in maintenance leadership receives a concise discussion of shift-management responsibilities and an invitation to a relevant session. Candidates who requested only live roles do not receive the broader content series.

SELF-REVIEW GUIDANCE

Explain the value of each item and how it relates to expressed interests. Include who owns replies and how updated preferences change later messages. Avoid turning the calendar into a fixed volume target.

LESSON 04 / 04

Evaluate relationship health

YOUR PRACTICE TASK

Create a monthly scorecard with four measures and one action threshold.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

A pool doubles in size after an import but current verified interest falls. The team pauses acquisition, checks permission and freshness, and measures relevant conversations per active record rather than celebrating the total count.

SELF-REVIEW GUIDANCE

Use defined denominators and distinguish active, stale and suppressed records. Include a quality measure that can trigger a pause. Do not equate database size with available talent.

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/

ICO: Recruitment and selection

UK guidance. Check its current status and updates before implementation.

https://ico.org.uk/for-organisations/uk-gdpr-guidance-and-resources/employment/recruitment-and-selection/

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.