



The Governance  
Institute

# A practical guide to offering work experience in company secretarial teams





**‘We want more people to choose to qualify as a company secretary or governance professional at the start of their careers, and enjoy the many opportunities this will give them’**

Tara Wilson, Head of Business Development, ICSA

# About this guide

There has never been a better time to work in the company secretarial profession. Candidates with company secretarial skills and governance know how are in demand by employers, corporate governance is high on the Government agenda and there is greater public awareness than ever of the need for organisations to be open and well-run. Yet the profile of the company secretary is still relatively low amongst law, business and finance graduates and those at the beginning of their careers.

At ICSA: The Governance Institute, we are working to change this. We cannot do this alone, and are grateful for the support of those members who collaborate with us to offer a range of taster experiences. These are designed to give young people a practical appreciation of what governance is, how it works, what they could bring to it and how to get started on a company secretarial career path. More information about these experiences is on pages 18-19.

We are always looking for more individuals and organisations to get involved. Some have told us that they would like to, but are not sure where to start, which has led to the preparation of this guide to planning work experience in a company secretarial environment. Based on the insights of ICSA members who run successful schemes, it introduces some of the advantages of, and questions around, work experience and provides a broad framework within which to decide whether offering work experience opportunities is right for you and, if so, how to go about it.

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# Why offer work experience?

Many of us benefit from having an extra pair of hands available – particularly for routine activities at busy times. However, it is useful to think more widely when you are considering providing work experience. Work experience is an opportunity to give and receive in different ways. Those who offer it often benefit on a commercial, cultural, reputational and industry-wide level.

## Commercial

Recruitment is one of the most common reasons why organisations value work experience schemes as an early way of getting to know the talent pool first-hand. Although there's a clear 'try before you buy' benefit in seeing how candidates adapt to your working environment, the very process of receiving applications and interviewing candidates also gives you a good sense of the broad spread of available talent.

Financially, this translates into tangible cost savings as recruitment costs can be around 15–20% of salary. Quality is also important, and the best person for a job in practice may not always be the one who presents best in theory. Work experience can therefore provide an empirical, pro-active, first-hand opportunity to find good people.

## Cultural

Work experience isn't necessarily a one-way flow of knowledge. Candidates are typically young, newly qualified or still studying, and with different cultural knowledge and experience. This may be from being 'digital natives,' operating in an environment that's always connected or being aware of the latest thinking and legislation from their recent studies. This can offer challenge and innovation to how you work.



## The industry case

As an industry, we all benefit. Company secretarial work may be unfamiliar to many potential good candidates, while others may be put off without an opportunity to find out more about the work we do. Work experience schemes help increase the talent that's available when we all seek to recruit.

## Reputational

Your organisation's reputation can be enhanced by a positive candidate experience. If they're already considering company secretarial work, they may already be in contact with others in a similar situation – particularly if they are also attending a course. Whether it is what they have to say about you, or the fact that your candidates go on to achieve good results, a good 'work experience' can benefit how your organisation is perceived.

# What kind of scheme is right for you?

A key decision in planning a work experience scheme is deciding what to offer. Although there are few rigid definitions, a rough guide is:

**Shadowing:** Very short duration (e.g. one-day) attachment to a specific person or role, with no formal employment contract.

**Work experience:** Limited-duration experience of working in an organisation, potentially in different roles/functions, possibly under a temporary contract.

**Trainee roles:** Limited-duration period, including a structured learning process, to prepare the trainee for permanent work in an organisation, whether generally or in a specific role.

Some current schemes include a one-day shadowing with little formal structure, two-week structured work experience, and two-month intensive traineeship. The numbers on a scheme will typically reflect your staffing levels and overall organisation size: a small office might be able to accommodate only one candidate, while a large organisation may be able to support several, in different offices, at the same time.

## Balancing costs with benefits

The best way to choose what kind of scheme you want to offer is to balance the costs with the benefits.

The direct costs are generally low and typically limited to expenses and a nominal, short-term wage.

The main indirect cost can be the time and effort of those involved in the scheme, whether in setting it up, supervising or running it, or in being shadowed. The real extent of these costs will depend very much on the type and scale of scheme you choose to operate. However, the perceived extent may be much higher, which is a common cause of resistance to such programmes.

The right balance between the benefits of a scheme and its costs will be different for each organisation, and what it wants to achieve. The remainder of this guide outlines many of the factors to consider in designing a scheme, to help you assess how to realise the benefits in the way that's right for you.



# Designing the scheme

The experience of working can be valuable in itself, even if it involves basic tasks such as photocopying and administration, so don't feel obliged to maximise formal learning in every moment. Designing a balanced scheme will help ensure the candidate gains useful insights.

## Scale

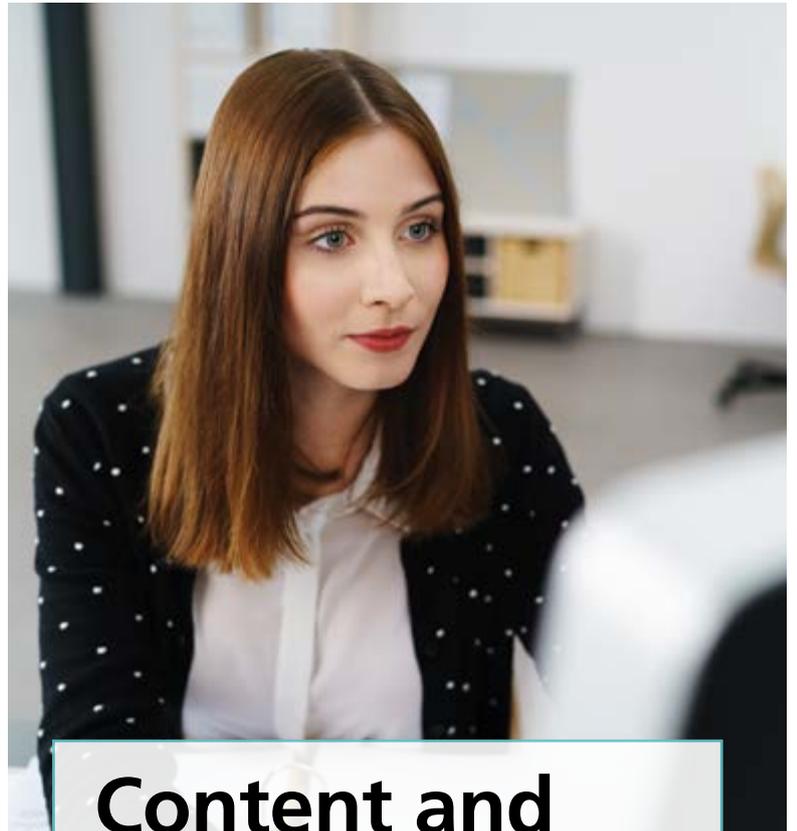
Whatever the form of scheme, the other broad consideration is its scale: its size, duration and intensity. An intensive scheme may need greater resourcing to plan and deliver, but can give candidates a well-focused range of experience and learning in a short time. These might take longer to gain where the candidate is helping with the team's workload, and left to make their own discoveries.

## Timing

There may seem to be natural good or bad times at which to take on work experience candidates, but these may not always be so clear cut. While less busy periods can typically afford more time to support candidates, it may also be that periods of change and activity can provide a particularly good experience. Consider too the external factors that may affect the availability and interest of potential candidates, such as the academic calendar.

## Set expectations

For each area of work, make sure that the candidate has understood what's expected of them and what they should expect. Although this may be covered in general terms at the outset, the specifics may vary between different work situations, so each team might wish to consider a brief, local introduction, to outline the candidate's role in each given situation.



## Content and confidentiality

Choosing the right areas of work to experience is essential, with several factors to balance: how to create the richest learning experience, how to minimise supervisory overhead at busy times, and how to ensure confidentiality is protected.

These judgements will vary. For instance, a trainee might be regarded as early-career permanent staff, subject to standard terms and conditions, and therefore able to work on confidential matters, but these might be unsuitable for those on a short visit. However, if such confidential work also offers a valuable insight into the governance function, you might find ways to accommodate this, such as a contract with a confidentiality clause.

# Support from the start

For work experience to deliver the broadest benefit, you need the broadest range of people involved. A champion of the scheme is essential in bringing a range of people together to make it happen. If you have read this far that champion may be you.

## The Champion

The champion for the scheme should have the vision to understand its value, and how the organisation can benefit. They need the energy to seek high-level sponsorship and commitment, not only for organisational approval, but to ensure that those in senior roles are enthusiastic about having work shadowed or observed. And they need the commitment to see the scheme through to realisation.

An important part of championing a scheme is to ensure that everyone appreciates the overall opportunity and benefit, without becoming resistant to the extra work they fear it might involve. While it is useful to think of it as an overall scheme in the advocacy, in the planning you can identify the specific requirements of any individual or function. Requesting a clear and well-defined commitment makes it easier to get agreement.

## HR support

You may need to involve HR in setting up a scheme, depending on the nature of your scheme and HR policies. For instance, one-day shadowing may require no more HR involvement than for any other visitor. On the other hand, a trainee scheme may need greater involvement.

A useful approach can be to present a well-considered scheme to HR, ensuring it has already addressed key compliance requirements, such as confidentiality or health and safety. Showing that these have already been considered can reassure the HR team that their involvement is largely to sign off on the scheme, rather than to do the work to set it up.

## Global vs local

The scale of your organisation will influence how you approach your scheme. For a small organisation, the people, policies and practices involved may be self-evident. A large organisation may already have policies and practices on work experience, at global or local levels, which you may need to consider. If guidelines already exist, they will provide a useful framework for a local scheme.



## Other functions

Other functions can be involved in providing useful learning experiences. However, the value of these experiences will depend on how enthusiastic the function is about the scheme, and having a broad understanding of where that enthusiasm lies will help you to plan a successful candidate experience.

# Practical considerations

Be clear what you're asking of the candidate in formal terms, so this is understood before they start. This may be as simple as setting start and end dates, and times of work. It may also include the status of their role. Some trainees might operate under permanent employee terms and conditions, whilst many work experience schemes essentially treat candidates as contractors.

## Payment and expenses

Pay is a common concern around work experience schemes. Salary must be determined to suit statutory requirements, government good practice guidelines, and the ethical standards of your organisation. There is no legal requirement to pay work experience candidates a minimum wage, although it's common to at least cover travel and subsistence costs. Your decisions on pay may also expand or shrink the talent pool to which you have access.

## Terms of engagement

Although no employee contract may be necessary, consider what arrangements need to be formalised in a contract or agreement. This might include confidentiality, working hours and any applicable grievance or complaints procedures.

As the scale and nature of schemes varies widely, be sure to get HR sign-off on the relevant legislation and standards that apply to your proposed scheme.

## Leaving scenarios

Most types of work experience scheme have a limited duration, which is known at the outset. That is, candidates normally leave on completion. On the other hand, a trainee might be expected to continue into a permanent role. Knowing the expected leaving scenario can help inform any contractual arrangements where applicable.



## Resolving problems

A well-considered approach to recruiting for and running a scheme, with clear expectations from both parties, should help minimise problems. But they can arise, and it may be useful to draw on established HR procedures to address them. Remember, though, that candidates may be unfamiliar with common disciplinary or termination practices so – if this does prove necessary – take care to do this professionally. Human sensitivity aside, this may reflect badly on your organisation if handled too heavily.

# Creating the candidate experience

When designing a scheme, consider what the experience will represent for the candidate. Even if they seem like a strong potential employee, this potential will be lost if the scheme is disorganised or lacks purpose. Candidates should expect some routine tasks as part of their experience and a good scheme will deliver something useful for both parties.



## Plan to be purposeful

It is essential to have a plan to make your work experience purposeful. The plan will help you to properly think through all the relevant aspects of a scheme, to present an argument that gains high-level buy-in for it and identifies resourcing requirements. It can also help build commitment and support, so both the organisation and the candidate get the best, or intended, experience. Although it is possible to accommodate ad hoc candidates, this is likely to be effective only for short, impromptu shadowing visits. Without a clear plan and intent, a longer scheme risks losing focus, leaving the candidate feeling confused, or treated simply as casual help.

Be clear about your reasons for running the scheme, its scale and structure, as well as who needs to be involved both in endorsing it, and during the scheme's operation.

Become familiar with any relevant resources that are already available, such as those for staff induction and training. These can help create an engaging and meaningful experience without having to write it all from scratch.

## Consider the cultural side of work

Do not underestimate the extent to which work experience can be a human and cultural learning process, as well as a vocational one. It may be a candidate's first time in any workplace, in an office, or in the governance function. All offices have their own culture and practice that may be second nature to those with experience, but may all be new to the candidate. The more conscious you are of these factors and the reasons for them, the more you can anticipate and plan the sort of experience a candidate will have.

Be aware too of what the candidate might bring. They might offer a fresh perspective on stale practices, and their questions might help revisit and articulate the entrenched rationale for how things are done.

# The learning process

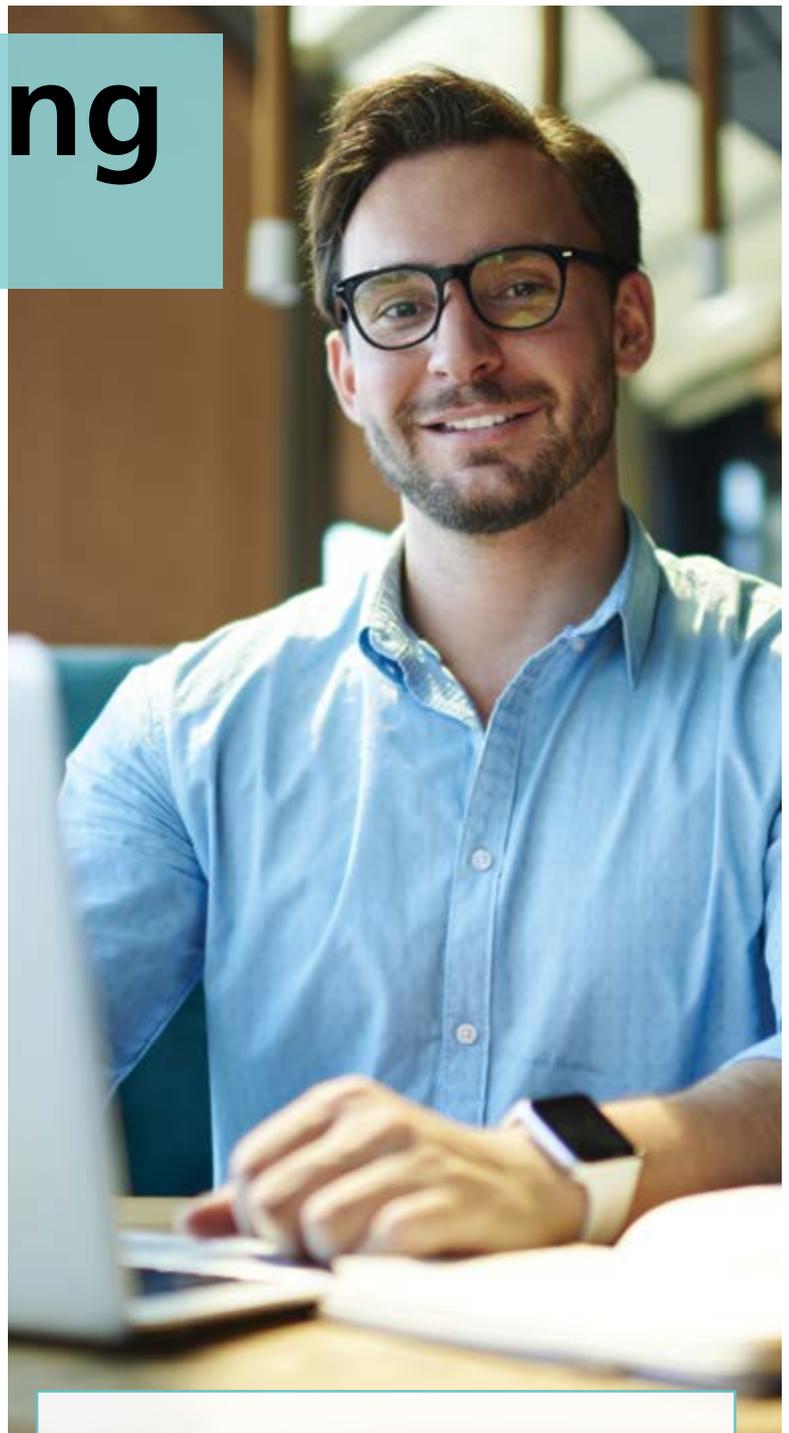
Some candidates' learning may come from their own curiosity, while some may be built into the design of the scheme. The balance is up to you. For instance, a one-day shadowing might simply involve the relevant staff member talking through whatever situations happen to arise, and responding to questions; while a traineeship could provide an extensive schedule of activities with a very specific and considered training intent.

Designing a useful learning experience involves understanding what knowledge the candidate brings with them. For instance, a dedicated governance course may provide a strong theoretical basis, but give little sense of how that manifests itself in practice.

Other considerations may be more routine cultural adjustments, to provide basic skills that are important in the workplace, but may be unfamiliar for those coming from outside. For instance, someone who is a capable communicator using WhatsApp or online chat may nonetheless be unfamiliar with making business phone calls. Or a candidate used to scrolling, online news may be less accustomed to discussion more commonly focused on daily business news in print media.

## Ongoing relationship

The value of a scheme need not end once it's over. The candidate may have made new contacts while with your organisation, and you might choose to maintain a relationship with, and network of, former candidates, even if not going on to employ them immediately. Not only does this give candidates a point of contact in the industry, it can also deliver a form of thought leadership, by establishing your organisation as a hub of activity in the profession.



## Reflecting back

While the scheme may have delivered a useful experience to the candidate, and the candidate drawn their own learnings from it, having them reflect this back can help reinforce their knowledge, and provide useful feedback on the scheme. This may arise naturally through ongoing chats with their buddy, but you might also invite the candidate to summarise their experience on the scheme, through a team presentation, or exit interview.

# Recruitment

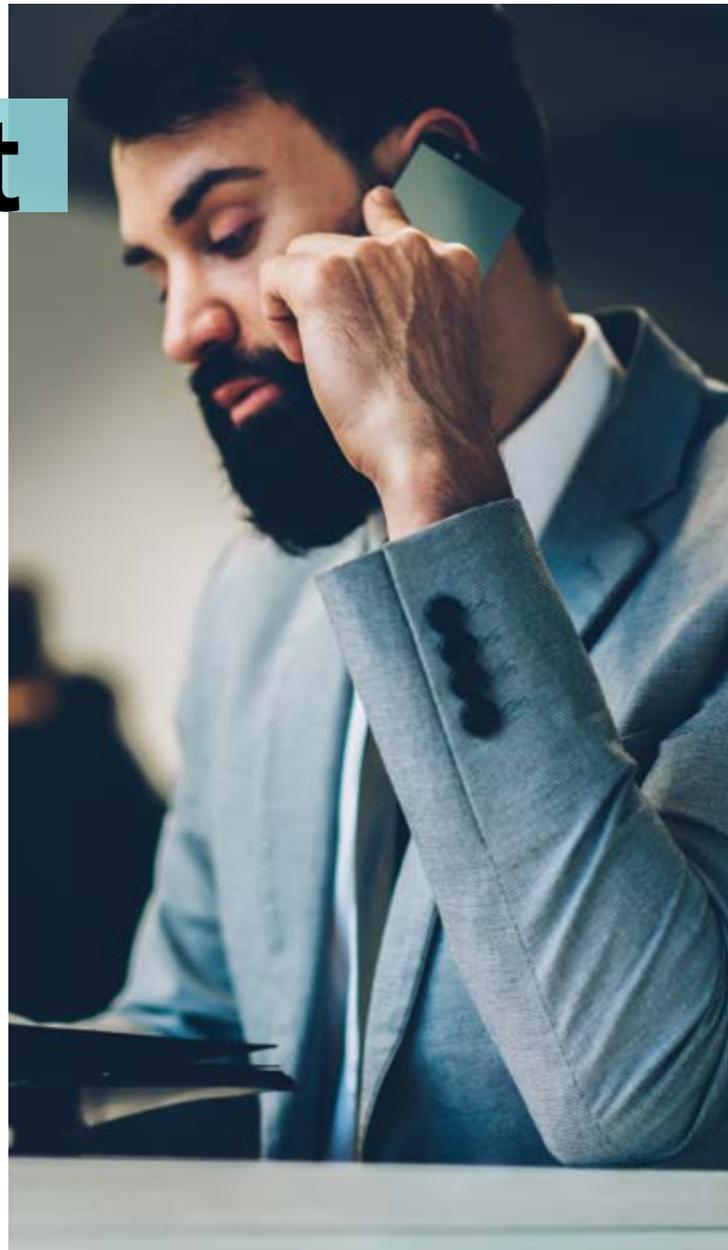
Recruitment processes need not change for different types of scheme, but they often do. For instance, organisations may already have different approaches to day visitors, temporary or contract staff, or permanent employees. The scale and intensity of the scheme may also determine how much recruitment effort is needed. For example, a traineeship scheme may involve significant resourcing to provide a clear learning process, so it's important this is a wise investment and may necessitate an extensive selection process. On the other hand, a one-day shadowing requires little extra effort and might be offered with no formal selection, such as a casual favour through personal contacts.

## The informal or unorthodox

In your selection process it is worth remembering that good candidates don't always come from the obvious places. For instance, the research skills developed in some humanities degrees or the people skills involved in event management can map well against those required in good company secretarial candidates. Apparently informal or random routes can also yield strong potential. And, of course, there may already be people elsewhere in your organisation who have the right aptitude for a short-term secondment or shadowing day or as trainees. These have the advantage that you or a colleague will already have an idea of their capabilities.

## Application process

Once potential candidates have been found, the next stage is typically to find out how they look on paper – usually with a CV and accompanying letter. Ideally, this letter might demonstrate their interest and enthusiasm for the company secretarial function, and give a sense of how they communicate.



## Formal targeting

If seeking graduates, recruitment fairs offer quick access to a broad talent pool. Those for the legal profession typically provide access to Law graduates, who have traditionally been favoured for company secretary roles. However, many of the key skills and aptitudes required can also be found in business and humanities graduates, who might attend more general graduate fairs. If you do not have the time or resource to attend fairs directly, ICSA can help to promote your requirements to a growing pool of graduates considering the company secretarial profession. There are also a number of postgraduate courses in Corporate Governance at UK universities that can be targeted directly or via ICSA.

# Selection

From the short-list of applications, the final choice is usually made through in-person selection process. For a substantial training scheme, this might involve a rigorous, day-long assessment with tests of writing, numeracy and communication skills. For less-intensive schemes, a single interview might suffice.

## Look for competencies

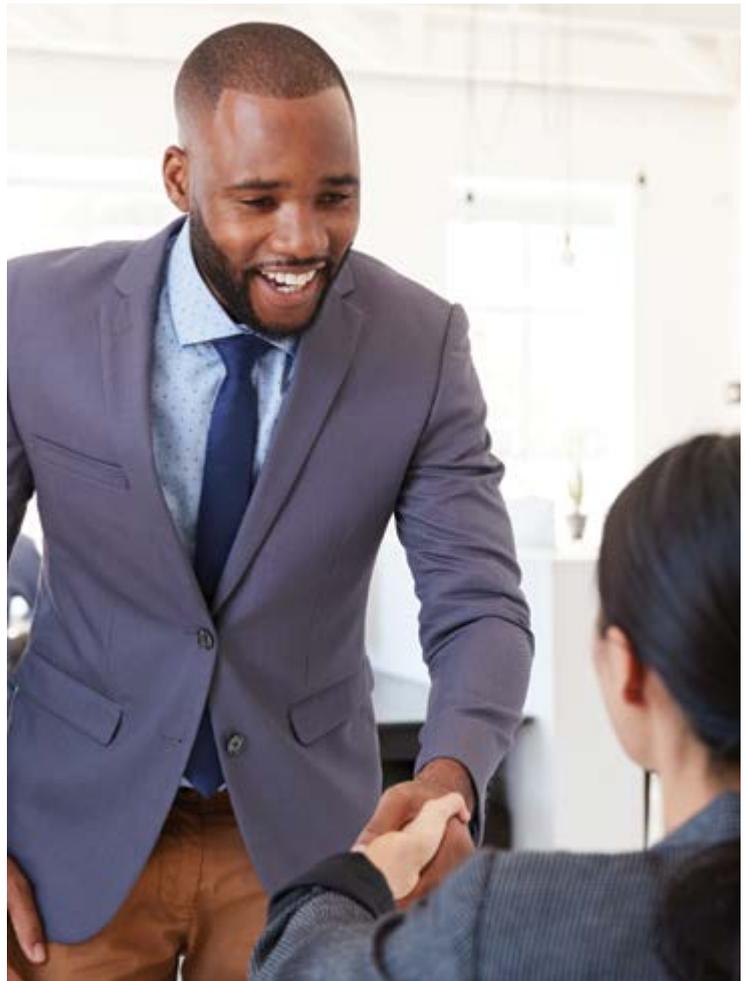
Be aware of what competencies you value in your governance team and know what to look for. Some may be easily defined and recognised, while others may be more intangible and instinctive.

These might include:

- Analytical skills
- Clear and concise writing style
- Thirst for knowledge and understanding
- Interpersonal and communication skills
- Drive
- Adaptability
- Resilience
- Diligence and a sense of assurance
- Autonomy
- Team player
- Ability to listen.

## Take a chance

There is no exact formula for excellence in this field of work. You may not get it right every time. But work experience is a small commitment and allows you to take a chance on who could be the best, if not the most obvious, candidate.



## Motivation matters

As well as ensuring a candidate has the right skills, they should also have the right motivation to ensure they get the best quality of experience. Do they show clear interest in company secretarial work and are you persuaded by what they want to get from the experience? In particular, do they show clear interest in your work, or have they only a more general interest in the governance field?

Unless HR policy requires it, there may be no specific need for a formal, competency-based interview – particularly for a short or simple work experience scheme. Candidates from some backgrounds may present as very polished in a formal interview, and informal interviews can offer the chance to discover the potential of a more diverse range of candidates. As long as interviewers have a clear focus on the essential aptitudes and attributes, you might find potential in unexpected places.

# Induction

Let the duration and content of your induction process suit the scale of your scheme. For a substantial placement or traineeship, this might be the same as for permanent appointments, while a one-day shadowing might require little more than brief coverage of confidentiality, safety procedures and introductions. Beyond immediate practicalities, provide some background knowledge, so trainees can contextualise their learnings. This might include outlining the wider context of your sector, organisation and the company secretarial role within that.

## Who should be involved?

Identifying who needs to be involved can help plan and balance the candidate's workload. The scheme organiser is the central focus, co-ordinating candidate activities. This could be the person who originally champions the scheme, or responsibility for running it may transfer to someone else. It needn't be onerous, and may simply involve briefing everyone else to ensure it runs smoothly, or providing a focus for queries when it doesn't. Avoid this becoming a solo role: ensure that enthusiasm for the scheme resides within everyone involved, and that responsibility for its success is shared.

## Timetable and activities

A timetable of activities can help drive the scheme, and also give the candidate a clear sense that their time is being spent purposefully. In addition to briefly sampling different areas of work, assigning a project to the candidate can help give them a clear focus and consolidate their varied areas of experience. You might also encourage them to keep a log or diary of their time, both as general record, and as notes to help inform their project.

## Peer support

For longer schemes, consider assigning a 'buddy' who can provide general or pastoral support, assist in the day to day logistics such as organising lunch and meeting other graduates/apprentices working in the business to give them a 'peer' view of work experience. Such a role might suit a team member with whom the candidate feels particularly comfortable, such as someone newly qualified and in a mid-level role. The ability to share knowledge and experience with someone in the same situation can help reinforce the learning process.

For each area of work, make sure that the candidate has understood what's expected of them, and what they should expect. Although this may be covered in general terms at the outset, the specifics may vary between different work situations, so each team might wish to consider a brief, local introduction, to outline the candidate's role in each given situation.



**‘I discovered the company secretary role through ICOSA, and was inspired to try a shadowing placement. This confirmed that it was right for me and helped me to show my enthusiasm and commitment when applying for trainee roles.’**

Law graduate



**'At Aviva we are committed to creating legacy. We see the work experience programme as a key part of bringing new talent into the industry and supporting the next generation of company secretaries'**

Julian Baddeley, Deputy Group  
Company Secretary & Corporate Counsel

# The Champion's Checklist

This checklist provides a quick summary of the key questions that you should ask in setting up your work experience scheme.

- What kind of scheme would work best for you, and what would you call it?
- How many candidates do you want to support?
- How long should your scheme be?
- What are the goals of your team? What are you trying to achieve for the candidate and for the organisation?
- What will be the balance between active learning and routine work in your scheme?
- Are there any 'no-go areas' for work experience or a requirement to manage client confidentiality?
- How far will the candidate's learning be driven by the scheme, or by their own curiosity?
- What timing will best balance supervisory, resourcing and learning priorities?
- What timing will best suit the availability and interest of candidates?
- Can you see your function from an outsider's point of view?
- How much recruitment time and effort will your scheme merit or require?
- What will happen to the candidate at the scheme's end?



# ICSA's Taster Experiences

Since 2014, ICSA has been working with its members in organisations across several sectors to engage more graduates with the company secretarial profession through a range of taster experiences. These are increasingly popular with ICSA students who are starting out in their governance careers, and those who are considering making the commitment to the ICSA qualifying programme or a validated postgraduate degree.

With the generosity and support of our members we offer:

- Day and week-long shadowing
- Opportunities to attend Annual General Meetings
- Work experience placements
- Graduate open evenings

Our dedicated job platform, ICSA Advance, is for organisations to promote, free of charge, their trainee and work experience opportunities to our pool of subscribers.

In addition, we work with our recruitment partner, DMJ, to support their growing programme Insight Days.

More information available about these free services is on our graduate hub: [icsa.org.uk/graduatehub](https://icsa.org.uk/graduatehub).

## How to get involved

If you would like to be part of our work to develop the profession and engage, inspire and support the next generation of company secretaries, we would love to hear from you.

**Mentoring** If you would like to know more about the mentoring programme that we are developing, please contact Lesley Ward [lward@icsa.org.uk](mailto:lward@icsa.org.uk) 07852 323 322

**Work experience** If you are considering offering an experience or would like to promote a trainee role, please contact Tara Wilson [twilson@icsa.org.uk](mailto:twilson@icsa.org.uk) 0207 7612 7021



**'ICSA has introduced me to several bright and enthusiastic individuals. It is important that companies help promote the role, give opportunities to graduates, and foster talent of the future'**

Tracey Brady, MD, Company Matters, part of Link Group



The Governance  
Institute

Have you considered offering work experience in your company secretarial team, but are not sure where to start?

This practical guide will help you to scope, plan and get your scheme and help us to develop the next generation of governance professionals.

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