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COURSE BROCHURE

# Advanced HR Due Diligence and People Integration Training Course

25 October – 5 November 2027
Rome

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Registered in the United Kingdom and Saudi Arabia

# Advanced HR Due Diligence and People Integration Training Course

**Ref:** 816_31028 **Date:** 25 October – 5 November 2027 **Location:** Rome **Fees:** 11100 GBP

HR Due Diligence and People Integration is a 2-week training course for HR directors and integration leads who handle the workforce side of mergers, acquisitions and joint ventures, and each participant leaves with a People Integration Plan for a live or recent deal. Most deals that miss their synergy targets stumble on people issues: departing talent, clashing cultures and unresolved pay gaps. The course is delivered by Jupiter Prime Training.

## Why HR Due Diligence and People Integration Matters Now

Deal activity keeps rising across family groups, state-linked holdings and private equity portfolios, and boards now ask HR to price workforce liabilities before signing rather than after closing. Acquirers also face employees who read every rumour online, so silence during the transaction period quickly turns into resignations. Handled well, the people workstream protects deal value, keeps critical know-how and speeds the move to one operating rhythm; handled badly, it brings hidden liabilities, regretted exits and a split culture. The course draws on ISO 30414 for the human capital metrics that frame before-and-after comparisons.

## Who Gains Most from HR Due Diligence and People Integration

- HR leaders who assess workforce liabilities and contracts in a target before signing
- Integration office leads who sequence people decisions from announcement to steady state
- Reward heads who harmonise pay grades, benefits and end-of-service terms across two entities
- Organisation design leaders who shape the combined structure and selection process
- Culture and engagement leads who track sentiment and retention through the transition

Corporate development and HR teams that attend together gain most, because the deal thesis and the people workstream are then built from the same assumptions.

## HR Due Diligence and People Integration Capabilities

Participants learn to treat the workforce as a priced asset and a source of deal risk, from the first data room request to the end of the integration period.

- Assess workforce liabilities, contracts and disputes in a target data room — the deal committee
- Calculate the cost of harmonising pay, benefits and end-of-service terms — the chief financial officer
- Design the combined organisation structure and a fair selection process — the integration steering group
- Build retention agreements for critical talent at risk of leaving — the acquiring executive
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Specify a culture integration approach based on a measured gap — business unit leaders
- Communicate the people roadmap from announcement through day 100 — employees and managers

## Key HR Due Diligence and People Integration Terms

- HR due diligence — the review of a target's workforce, contracts, liabilities, policies and culture before a deal is signed.
- Day one readiness — the set of people actions, systems and messages that must work on the first day after closing.
- Retention agreement — a contract offering staged payments to key staff who remain through a defined integration period.
- Pay harmonisation — aligning grades, salary ranges and benefits of two workforces into one consistent structure.
- Culture gap assessment — a structured comparison of values, decision habits and working norms between the merging organisations.
- Integration management office — the temporary unit that coordinates workstreams, decisions and milestones after a deal closes.

## HR Due Diligence and People Integration Day by Day

## Day 1: The People Side of the Deal Lifecycle

- Deal Lifecycle Map — Where HR Enters Screening, Signing and Closing
- Deal Thesis Review — Which Synergies Depend on People Decisions
- Transaction Structures Compared — Share Purchase, Asset Purchase and Joint Venture
- Confidentiality Protocols — Clean Teams and Restricted Workforce Data
- Lessons From Failed Integrations — Recurring People Causes of Value Loss

## Day 2: Planning HR Due Diligence

- HR Due Diligence Request List — Contracts, Policies, Disputes and Headcount
- Data Room Navigation — Spotting Gaps and Red Flags Quickly
- Management Interview Guides — Testing Claims Behind the Documents
- Risk Rating Matrix — Separating Deal Breakers From Price Adjusters
- Due Diligence Findings Report — Feeding Warranties and Indemnities

## Day 3: Workforce Liabilities and Contracts

- Employment Contract Audit — Change-of-Control and Notice Clauses
- End-of-Service and Pension Obligations — Valuing Accrued Liabilities
- Litigation and Grievance Exposure — Open Cases and Settlement Risk
- Labour Law Compliance Checks — Licences, Permits and Quota Status
- Executive Agreement Review — Golden Parachutes and Non-Compete Terms

## Day 4: Culture Assessment

- Culture Gap Assessment — Values, Decision Rights and Working Norms
- Pulse Survey Design — Measuring Sentiment in Both Organisations
- Leadership Style Mapping — Predicting Friction Between Management Teams
- Integration Model Choice — Absorb, Preserve, Combine or Transform
- Culture Integration Roadmap — Rituals, Symbols and Leadership Behaviours

## Day 5: Organisation Design for the Combined Entity

- Combined Structure Options — Spans, Layers and Duplicate Roles
- Capability Mapping — Which Unit Keeps Which Expertise
- Talent Selection Process — Fair Criteria for Contested Positions
- Redundancy Planning — Consultation, Selection and Severance Sequencing
- Decision Rights Charter — Approval Authority in the New Organisation

## Day 6: Pay and Benefits Harmonisation

- Job Evaluation Alignment — Mapping Two Grading Systems to One
- Salary Range Comparison — Red-Circle and Green-Circle Cases
- Benefits Gap Analysis — Allowances, Medical Cover and Leave Terms
- Harmonisation Cost Model — Phasing Options Within the Synergy Budget
- Incentive Plan Transition — Bonus and Long-Term Award Treatment

## Day 7: Retaining Key Talent

- Critical Talent Identification — Revenue, Client and Technical Know-How Holders
- Flight Risk Scoring — Signals From Tenure, Pay Position and Role Change
- Retention Agreement Design — Amount, Vesting and Clawback Terms
- Stay Conversations — Manager Scripts for the First Weeks
- Knowledge Capture Plans — Protecting Expertise Before Possible Exits

## Day 8: Integration Planning and Day One Readiness

- Integration Management Office Set-Up — Workstreams, Owners and Cadence
- Day One Readiness Checklist — Payroll, Access, Contracts and Policies
- HR Systems Migration Plan — Records, Payroll and Self-Service Cut-Over
- First Hundred Days Plan — Milestones and People Decision Gates
- Integration Dashboard — Retention, Sentiment and Synergy Indicators

## Day 9: Communication and Change Leadership

- Announcement Day Sequence — Leaders, Managers and Employees in Order
- Manager Briefing Packs — Answering Uncertainty Without Over-Promising
- Employee Representative Engagement — Consultation Forums and Timing
- Rumour Tracking and Response — Listening Channels During Transition
- Leadership Alignment Sessions — One Story From Both Executive Teams

## Day 10: Practising the People Integration Plan

- Due Diligence Case Simulation — Rating Findings From a Mock Data Room
- Harmonisation Cost Presentation — Defending Phasing to a Finance Panel
- Structure and Selection Review — Peer Challenge on Fairness
- Retention and Culture Actions — Linking Measures to Day One Readiness
- People Integration Plan Completion — Workstreams, Milestones and Owners

## Applying HR Due Diligence and People Integration After the Course

- Build an HR due diligence request list and risk rating matrix ready for the next deal screening
- Run a culture gap pulse survey in a recently acquired unit and agree three integration actions with its leaders

## HR Due Diligence and People Integration Questions FAQ

### What is HR Due Diligence and People Integration and why does it matter now?

HR Due Diligence and People Integration is the work of pricing workforce risk before a deal and combining two workforces after it. It matters now because deal values increasingly depend on keeping talent and culture intact through the transition.

### Which roles gain most from HR Due Diligence and People Integration training?

HR directors and integration leads gain most. You benefit if you review targets with a deal team, run an integration office, harmonise reward across entities or lead culture and communication during a merger.

### How does HR Due Diligence and People Integration differ from a general mergers and acquisitions course?

It focuses on the workforce rather than valuation and deal financing. A general deal course covers target screening, valuation and legal structure, while this course covers contracts, culture, pay harmonisation, retention and the people workstream of integration.

### What do you bring back from HR Due Diligence and People Integration training?

You bring back a ready-to-use people workstream for a deal. It includes a due diligence request list, a harmonisation cost model, retention agreement terms and a day one readiness checklist, tested through a case simulation.

## HR Due Diligence and People Integration: The Way Forward

The People Integration Plan sets out workstreams, owners, milestones and decision gates for the workforce from signing to the end of integration. Its first use is agreeing day one priorities with the integration steering group, and line leaders then use it to brief their teams. After the first hundred days, revisit retention and sentiment results and reset the remaining milestones.