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COURSE BROCHURE

# Bank Talent Retention and Incentive Pay Design Training Course

11 – 15 January 2027
Milan

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**Ref:** 2254_83665 **Date:** 11 – 15 January 2027 **Location:** Milan **Fees:** 6200 GBP

Bank Talent Retention and Incentive Pay Design is a 1-week training course for HR business partners, reward specialists and line managers in banks and financial firms, who leave with a Talent Retention and Incentive Blueprint for one business unit. Banks compete with fintech firms for scarce credit and data skills, while boards expect pay to reward conduct as well as revenue. Jupiter Prime Training delivers this bank talent retention and incentive pay design course.

## Why Bank Talent Retention and Incentive Pay Design Matters Now

Three forces shape banking people decisions. Digital channels shrink branch roles while raising demand for analysts and risk specialists. Boards expect variable pay to reflect risk taken, with deferral, malus and clawback in award terms. Employees compare employers on flexibility and learning as much as salary. A bank that reads these forces keeps its credit officers through the cycle; one that does not pays in attrition and conduct losses. The course rests on balanced scorecard thinking and total reward models.

## Who Gains Most from Bank Talent Retention and Incentive Pay Design

- HR business partners who advise on succession and exit risk
- Reward and compensation specialists who set bonus pools and deferral terms
- Line managers who run performance conversations for credit teams
- Workforce planners who forecast headcount and skill demand
- Finance partners who cost staff budgets

A bank division gains most when its HR partner, reward specialist and line manager attend together.

## Bank Talent Retention and Incentive Pay Design Capabilities

Participants turn attrition reports into pay and career choices for critical bankers.

- Assess flight risk in critical roles — succession decisions for divisional heads
- Design a bonus pool that links funding to risk-adjusted profit — the remuneration committee
- Specify deferral, malus and clawback terms — award letters and employee trust
- Calculate the cost of attrition for a relationship banking team — the business case to finance
- Build a scorecard that blends financial, customer and conduct measures — fair year-end ratings
- Communicate total reward statements — retention conversations with staff

## Key Bank Talent Retention and Incentive Pay Design Terms

- Flight risk — the likelihood that a valued employee leaves within a set period.
- Bonus pool — the total sum available for variable awards in a year, funded from profit after a charge for risk and capital.
- Deferral — holding back part of a variable award and releasing it over later years.
- Malus — reducing or cancelling an unvested deferred award when later evidence shows misconduct or a material loss.
- Clawback — recovering variable pay already paid after serious misconduct emerges.
- Total reward — the full package an employee values: pay, benefits, flexibility and growth.

## Bank Talent Retention and Incentive Pay Design Day by Day

## Day 1: People Forces Reshaping Banking

- Skill Shift Mapping From Branches To Digital — Which Roles To Grow Or Retire
- Critical Role Identification In Credit And Treasury — Where Vacancy Hurts Revenue Most
- Employee Value Proposition Audit — How The Bank Competes With Fintech Employers
- Attrition Cost Model For Relationship Teams — Size Of The Retention Business Case
- People Metrics Linked To Cost-To-Income Ratio — Board Reporting On Workforce Spend

## Day 2: Workforce Planning and Talent Pipelines

- Headcount Demand Forecast By Business Line — Hiring Budgets For The Next Cycle
- Nine-Box Talent Grid For Bankers — Succession Choices For Senior Credit Roles
- Internal Mobility Paths Between Retail And Corporate Banking — Reducing External Hiring
- Graduate And Lateral Hire Mix — Balancing Build Versus Buy For Skills
- Stay Interview Guide For Key Staff — Early Warning Before Resignations

## Day 3: Performance and Conduct Measures

- Balanced Scorecard For Front-Office Roles — Weighting Revenue Against Customer Outcomes
- Conduct Gateways And Risk Modifiers — When A Rating Must Be Capped
- Calibration Panels For Year-End Ratings — Consistency Across Branches And Desks
- Goal Setting For Control Functions — Independence From Business Line Results
- Performance Conversation Scripts For Line Managers — Handling Disputed Ratings Fairly

## Day 4: Incentive Pay and Deferral Design

- Risk-Adjusted Bonus Pool Funding Formula — Sizing Awards After Capital Charges
- Fixed To Variable Pay Ratio Choices — Stability Versus Motivation For Bankers
- Deferral Schedules In Cash And Shares — Retention Effect Over Several Years
- Malus And Clawback Trigger Wording — Enforceable Terms In Award Letters
- Sales Incentive Review For Retail Products — Avoiding Mis-Selling Pressure

## Day 5: Practising the Talent Retention and Incentive Blueprint

- Flight Risk Register For One Business Unit — Applying Day 1 Critical Role Mapping
- Succession Cover Plan For Top Roles — Applying Day 2 Talent Grid Results
- Scorecard And Pay Mix Test On Sample Staff — Applying Days 3 And 4 Methods
- Total Reward Statement Draft — How Managers Explain The Package
- Talent Retention And Incentive Blueprint — Sign-Off Pack For Divisional Leadership

## Applying Bank Talent Retention and Incentive Pay Design After the Course

- Run stay interviews with the highest flight-risk bankers in one division and log agreed actions.
- Re-test the bonus pool formula against risk-adjusted profit and present revised deferral terms.

## Bank Talent Retention and Incentive Pay Design Questions FAQ

### What is bank talent retention and incentive pay design, and why does it matter now?

It is the practice of keeping critical bankers and paying them to reward sound risk-taking. It matters because digital rivals compete for the same skills.

### Which roles gain most from bank talent retention and incentive pay design?

HR business partners, reward specialists and line managers gain most, with workforce planners and finance partners in banks and insurers close behind.

### How does bank talent retention and incentive pay design differ from a general HR strategy course?

It applies people methods to banking pressures. A general HR strategy course covers choices across sectors; this one deals with bonus pools, deferral and conduct gateways.

### What do you bring back from bank talent retention and incentive pay design?

You bring back a blueprint for one business unit: a flight risk register, succession cover, a tested scorecard and pay mix, and a total reward statement.

## Bank Talent Retention and Incentive Pay Design: The Way Forward

The Talent Retention and Incentive Blueprint first informs which critical bankers receive retention action before the next award round. Divisional heads, HR partners and the remuneration committee use it to align pay with risk. After its first year, revisit whether deferral terms kept the people they targeted and adjust scorecard weights.