JUPITER PRIME
Consulting • Training • Advisory
جوبيتر برايم للاستشارات والتدريب

COURSE BROCHURE

Employee Share Options and Startup Equity Planning Training Course

24 – 28 May 2027
Rome

Employee Share Options and Startup Equity Planning Training Course

Ref: 2446_92428 **Date:** 24 – 28 May 2027 **Location:** Rome **Fees:** 6200 GBP

Employee Share Options and Startup Equity Planning is a 1-week training course for founders, startup finance leads and growth-stage managers who allocate ownership to staff, producing an equity incentive and cap table plan. As young companies compete for scarce talent, share-based rewards decide who joins, who stays and what founders still hold at exit. Jupiter Prime Training delivers this course on Employee Share Options and Startup Equity Planning.

Why Employee Share Options and Startup Equity Planning Matters Now

Three forces shape equity planning today: hiring markets where cash salaries cannot match larger employers, investors who scrutinise option pool size before each round, and staff who ask what their grants are worth. Handled well, options align early hires with growth and keep the ownership register clean for investor due diligence. Handled badly, they bring surprise ownership loss, leaver disputes and unbudgeted accounting costs. The course draws on share-based payment accounting principles and widely used grant, vesting and exercise conventions.

Who Gains Most from Employee Share Options and Startup Equity Planning

- Founders setting aside ownership for current and future hires
- Finance leads maintaining the register and modelling each grant
- Reward leads designing offers that combine salary and equity
- Company secretaries keeping approvals and option agreements in order
- Growth-stage managers explaining equity offers to staff

Leadership groups sending a founder, finance lead and reward lead together gain most, as pool sizing and grant policy then rest on one model.

Employee Share Options and Startup Equity Planning Capabilities

Participants turn scattered grant promises into a deliberate equity allocation that founders, staff and investors can read.

- Calculate fully diluted ownership before and after each grant and pool top-up — founders and the board
- Design a vesting schedule with cliff, acceleration and leaver terms — hiring managers and departing staff
- Size an option pool against a twenty-four-month hiring roadmap — incoming investors
- Set strike prices and grant bands by role and seniority — reward leads and candidates
- Assess the accounting charge and cash effects of share-based awards — finance leads and auditors
- Communicate grant value and exit scenarios in plain terms — employees weighing an offer

Key Employee Share Options and Startup Equity Planning Terms

- Option pool — shares reserved for future grants to employees and advisers, set as a share of fully diluted capital.
- Vesting — how an employee earns granted options over time or on agreed milestones.
- Cliff — an initial period before which no options vest; leaving earlier forfeits the grant.
- Strike price — the fixed price per share paid on exercise, normally fair value at grant.
- Fully diluted capital — the share count assuming every option and convertible becomes ordinary shares.
- Good and bad leaver — categories deciding whether a departing holder keeps or loses vested equity.

Employee Share Options and Startup Equity Planning Day by Day

Day 1: Ownership Structure and Equity Incentive Context

- Ownership Register Anatomy — Who Holds What Before Any Grant
- Share Classes and Ordinary Shares — Rights Employees Actually Receive
- Options Versus Restricted Shares Versus Phantom Equity — Instrument Choice
- Talent Market Benchmarks for Equity Offers — Competitive Positioning
- Founder Share Vesting — Protecting the Company From Early Departures

Day 2: Option Pool Sizing and Grant Policy

- Hiring Roadmap Mapping — Linking Pool Size to Planned Headcount
- Pre-Money Versus Post-Money Pool Top-Ups — Who Bears the Cost
- Grant Bands by Role and Seniority — Consistent and Defensible Offers
- Refresh Grants for Long-Serving Staff — Retention After Initial Vesting
- Board Approval Workflow — Authorising Grants and Keeping Minutes

Day 3: Vesting, Exercise and Leaver Terms

- Time-Based and Milestone Vesting Schedules — Matching Reward to Contribution
- Single and Double-Trigger Acceleration — Treatment on Sale of the Company
- Exercise Windows and Cashless Exercise — Affordability for Departing Staff
- Good and Bad Leaver Clauses — Fair Outcomes When People Leave
- Buy-Back and Transfer Restrictions — Keeping the Shareholder Base Manageable

Day 4: Valuation, Accounting and Employee Communication

- Fair Value at Grant Date — Setting Strike Prices Credibly
- Option Pricing Inputs and Volatility Assumptions — Expense Measurement
- Share-Based Payment Expense Schedules — Profit and Loss Effects
- Exit Waterfall Scenarios — What a Grant Could Be Worth
- Equity Offer Statements for Staff — Clear Explanations of Value

Day 5: Practising the Equity Incentive and Cap Table Plan

- Fully Diluted Ownership Model Build — Applying Day 1 Register Work
- Pool Top-Up Stress Test Against Hiring Roadmap — Applying Day 2
- Leaver and Acceleration Scenario Runs — Applying Day 3 Terms
- Expense and Exit Value Summary for the Board — Applying Day 4
- Equity Incentive and Cap Table Plan — Final Peer Challenge

Applying Employee Share Options and Startup Equity Planning After the Course

- Reconcile the ownership register against signed option agreements and correct gaps before the next investor review.
- Run a grant band review testing current offers against pool headroom and the hiring roadmap.

Employee Share Options and Startup Equity Planning Questions FAQ

What is Employee Share Options and Startup Equity Planning and why does it matter now?

It is deciding how much ownership a young company grants staff and on what terms. It matters now because hiring competition is fierce and investors examine option pools closely.

Which roles gain most from Employee Share Options and Startup Equity Planning?

Founders, finance leads, reward leads and company secretaries gain most. Each handles a different part of the grant cycle, from pool sizing to the accounting charge.

How does Employee Share Options and Startup Equity Planning differ from a course on raising investment?

It focuses on equity given to staff rather than shares sold to investors. You work on pools, vesting and leaver terms, while investment courses centre on pitching and pricing a round.

What do you bring back from Employee Share Options and Startup Equity Planning?

You bring back an ownership model and grant policy for your company, showing holdings, pool headroom, vesting rules and the expected accounting charge.

Employee Share Options and Startup Equity Planning: The Way Forward

The equity incentive and cap table plan gives founders and finance leads one agreed view of who owns what and what each future grant will cost. Its first use is usually sizing the pool before the next hiring wave or investor conversation. Revisit it after the first leaver case or acceleration event, when real outcomes test whether the terms felt fair.